

CA40NHBLH86
68C52

HAMILTON PUBLIC LIBRARY

SEP 23 1981

GOVERNMENT DOCUMENTS

✓ COMMERCIAL DEVELOPMENT ✓ IN HAMILTON

a report to the

HAMILTON ECONOMIC
DEVELOPMENT COMMISSION



Arthur D. Little, Inc.

COMMERCIAL DEVELOPMENT
IN HAMILTON

A Report to the

HAMILTON ECONOMIC
DEVELOPMENT COMMISSION

October 1968

C-70455



Arthur D. Little, Inc.

This report is rendered upon the condition
that it is not to be reproduced in whole or
in part for advertising or other purposes
without the special permission in writing of
Arthur D. Little, Inc.

TABLE OF CONTENTS

	Page
List of Tables	v
I. SUMMARY	1
A. PURPOSE AND SCOPE	1
B. APPROACH	1
C. CONCLUSIONS	1
D. RECOMMENDATIONS	2
II. A BRIEF LOOK AT HAMILTON, ONTARIO	5
A. INTRODUCTION	5
B. PROFILE OF THE ECONOMIC BASE	6
III. HAMILTON'S COMMERCIAL ACTIVITY	11
A. INTRODUCTION	11
B. INTERPRETING THE DATA	11
C. ANALYSIS OF CONDITIONS	60
IV. DEVELOPMENT POLICIES FOR HAMILTON	70
A. INTRODUCTION	70
B. LONG- AND SHORT-TERM GOALS FOR HAMILTON	70
C. THE POLICY PROGRAM FOR HAMILTON	72
D. IMPLICATIONS FOR HAMILTON	85

LIST OF TABLES

Table No.		Page
1	Population of Hamilton, Hamilton CMA, Ontario and Canada — Years 1951, 1956, 1961, 1966	7
2	Employment by Type of Industry	10
3	Per Capita Sales for Canada, Ontario and Hamilton, Toronto, and London Central Cities of Standard Metropolitan Areas — 1966 Estimates	12
4A	Per Capita Retail Sales for 1961, for Canada, Ontario, Hamilton CMA, Toronto CMA, and London CMA	14
4B	Comparison of Hamilton's Per Capita Retail Sales with Toronto and London, CMA Basis, 1961 by Type of Establishment	19
5A	Per Store Retail Sales, 1961 for Canada, Ontario, and Hamilton CMA, Toronto CMA, and London CMA	22
5B	Comparison of Hamilton's Retail Sales per Store with Toronto and London, CMA Basis, 1961	28
6A	Per Capita Service Sales 1961, for Canada, Ontario, and Hamilton CMA, Toronto CMA, and London CMA	30
6B	Comparison of Hamilton's per Capita Service with Toronto and London, CMA Basis, 1961, by Type of Establishment	36
7A	Per Store Service Sales, 1961 for Canada, Ontario, and Hamilton CMA, Toronto CMA, and London CMA	38
7B	Comparison of Hamilton's Service Sales per Store with Toronto and London, CMA Basis, 1961	44
8A	Wholesale Sales per Establishment for Canada, and Ontario and Hamilton, Toronto and London CMA for 1961	46

LIST OF TABLES (Continued)

Table No.		Page
8B	Comparison of Hamilton's Wholesale Sales per Store with Toronto and London, CMA Basis, 1961 by Type of Establishment	58
9	CMA per Capita Retail Sales and per Capita Personal Disposable Income	68
10	Per Capita Retail Sales for CMA and Central Cities and Percentage Differences, 1961	69
11	Recent Development Projects in Hamilton	71

I. SUMMARY

A. PURPOSE AND SCOPE

The Economic Development Commission of Hamilton, Ontario, asked Arthur D. Little, Inc. to study the adequacy of Hamilton's commercial activities and to advise the Commission of policies it might adopt to stimulate growth in these activities if that was found to be necessary. Specifically, the Commission requested that the study address itself to the following questions:

1. Does the development of retailing, wholesaling, and other commercial services really lag far behind community need and far behind that proportion of commercial development necessary, in Hamilton's context, for a reasonably balanced economic structure?
2. If so, what can Hamilton do about it?

B. APPROACH

Our approach to answering the questions involved three steps. We gathered and analyzed statistics on the performance of Hamilton's commercial industries and compared them with like statistics for Toronto, London, the Province of Ontario, and Canada as a whole. We conducted extensive field interviews with leaders from business, labor, and government in Hamilton and in other cities to learn how the problem is perceived in the city and what causes for the problem are thought important by the people. Finally, we visited Cleveland, Ohio; Pittsburgh, Pennsylvania; and Bridgeport, Connecticut, to investigate programs these cities have developed to create an environment conducive to growth.

C. CONCLUSIONS

1. The major causes of Hamilton's lag in commercial activity as compared to that of Toronto, London, the province, and the nation, are as follows:

- Hamilton's proximity to Toronto.
- The physical condition of Hamilton's downtown shopping area.
- The image of Hamilton held by residents and outsiders.

2. Most statistical comparisons reveal that Hamilton clearly lags behind the other metropolitan areas in retail, wholesale, and service sales. In many comparisons Hamilton barely exceeds province-wide and nationwide performances. In retail sales deficiencies were found in amenity lines and "big ticket" items; in service sales, Hamilton lags behind in business services and in recreation-tourism.

3. Our interviews of community leaders provided a mixed set of opinions about the strength of Hamilton's commercial industries and about peoples' shopping behavior. Suburban dwellers remarked more often than city dwellers that shoppers go to Toronto for important purchases. The majority of those interviewed emphasized that Hamilton's "lunch bucket" image discouraged people from shopping in the city.

4. Our visits to Cleveland, Pittsburgh, and Bridgeport revealed several principles about creating an environment conducive to commercial activities that can be applied to Hamilton. For example, successful programs require the dedication of the Mayor and prominent private citizens. Organizations, operating in economic, cultural, and social spheres, need to be formed to create and operate a development program, and that program must attack the basic constraints to growth and expansion.

D. RECOMMENDATIONS

For the long term, to assure the growth of commercial activity in Hamilton — and to assure the creation of an image that more accurately depicts the city — we recommend a three phase program:

Phase I: A detailed examination of the structure of the retailing, wholesaling, and service industries in order to identify and assess areas of hidden demand. Once this has been accomplished, a program to inform business firms likely to sponsor such activities in Hamilton should be undertaken. Special attention should be paid to improving business service activities because these are important in attracting to a city headquarters and other office operations of private firms and government agencies.

Phase II: A program to capitalize on the Civic Square renewal project in order to improve the physical appearance of the city.

- Downtown buildings outside the Civic Square project should be renovated.
- The York Street renewal project should be completed more quickly than planned at present.
- A commercial area offering a variety of goods keyed to the nations of origin of Hamilton's citizens should be created.

- Industrial buildings in Hamilton should be painted in bright, contrasting colors.
- Air pollution should be reduced.
- Neighborhood groups should be formed to plan and execute beautification and improvement programs.
- A development corporation should be formed to provide financial and technical assistance to new and interested business firms.

Phase III: A program of public and private development activity to further improve the richness of the city's cultural and social life and to give further opportunities for interested citizens to participate in the improvement of their city. Such activities must be designed by the people who participate. Our recommendations set forth the nature of the program, and specify the necessary people, organizations, tasks, and responsibilities.

- Hamilton should expand the city government development function to include a comprehensive program of physical and social (as well as economic) aspects of growth and change.
- To coordinate all aspects of Hamilton's development, a position of Director of Development should be created in the Mayor's office. The position should offer a salary high enough to attract the most able and imaginative men available.
- Prominent citizens in the private sector should form an organization to institute programs to further the development of Hamilton. This organization should be independent of city government, but should work closely with it.
- Public and private development groups should together plan and carry out a program of enriching cultural and social life in Hamilton. Through sponsorship of events like an international music festival, Hamilton's development organizations should be able to create a new image that emphasizes progressiveness and modernity. In such programs officials of the Hamilton Economic Development Commission and McMaster University working together could be especially influential.

- In addition to cultural and social programs, development groups should assess citizens' attitudes about the city's programs to arrive at priorities. This program should be heavily publicized so that it will represent the current thinking of as many of Hamilton's citizens as possible.

II. A BRIEF LOOK AT HAMILTON, ONTARIO

A. INTRODUCTION

For many cities in Canada and the United States a study of commercial activity would seem to be secondary in need to a study of the growth and development of basic industry. For them the future of basic industry is a source of worry and anxiety. This is not the case for Hamilton. Hamilton, to be sure, cannot afford to ignore its basic industry. Efforts to develop new basic industry and to minister to the needs of the companies that already reside in the city are, of course, of extreme importance and the Hamilton Economic Development Commission continues to work to strengthen the city's economic base. But there comes a time in the life of some cities when additional questions begin to be asked. This, we believe, is what is happening in Hamilton.

Hamilton has experienced a period of steady economic growth. While that growth has not been spectacular, it has been long and steady and the city's industry is in good condition. Hamilton is located in the heart of Canada's most prominent area of industrial growth, and it should continue to benefit from this. Community leaders in Hamilton, however, are becoming concerned by another kind of question. They are looking to the lighter industries; to industries that promise new roles for Hamilton. Should not Hamilton move on and begin to develop additional functions? Should not it develop its administrative, financial, and cultural activities? Should not it become the kind of place where its citizens can find more of the amenities of life than presently are available? In short, these community leaders are beginning to wonder if they cannot change the nature of the city. They wish to build on its industrial base a new structure of industry and commercial activity, to create a city that will be a vital and pleasing place to live.

Implicit in the above discussion is the conviction that public and private officials in a community can successfully form policies to guide its future development. We believe that development can be guided. Some policies require only minimal expenditures to achieve satisfactory results. Other policies may indeed require considerable investments. The difficulty of the problem faced by a community and its motivation to deal with it are twin influences. When problems are difficult and the community deeply desires to solve them, then policy programs are likely to be extensive. The simpler the problem and the less pressing the need to solve it, the fewer the resources that will be committed. Our work reflects this basic fact.

B. PROFILE OF THE ECONOMIC BASE

1. Population

As Table 1 reveals, population growth in the City of Hamilton from 1961 to 1966 consisted of approximately 25,000 people. This growth, while brisk, was considerably less than that which occurred in the periods 1951-1956 and 1956-1961. Growth in these periods approximated 31,500 and 34,500 people respectively.

Hamilton's rate of growth, while not unsatisfactory, has lagged behind that of the Census Metropolitan Area (CMA) and the Province of Ontario as well as that for Canada as a whole. It would be expected, of course, that growth in Hamilton would lag behind these areas in absolute numbers because it is smaller. The percentage growth of the Hamilton CMA is considerably faster than that of the central city itself. This is to be expected because land in the central city is economically scarce compared to that in the suburban areas. The future should see a continuation of this influence. In fact, the growth rate differential between the city and the CMA should widen.

Figures developed by the Hamilton Chamber of Commerce may be used to widen the comparison between Hamilton and other cities. On a CMA basis Hamilton's growth again is steady but certainly not spectacular when compared to some other places. From 1961 to 1966 the Hamilton CMA growth, at 13.2%, lags considerably behind the 23.4% recorded by Kitchner. Edmonton and Calgary also ranked high at 18.1% and 17.6% rate of population growth respectively between 1961 and 1966. On the other hand, a number of cities grew much slower than Hamilton in this period. The Sudbury CMA grew only 5.3% from 1961 to 1966. Halifax and Winnipeg also grew considerably slower as did Vancouver and Windsor. The Hamilton CMA grew approximately the same amount in percentage terms as did London, Ottawa, and Quebec during the same period.¹

Projections made by the Ontario Department of Economics and Development for the period 1961 to 1986 show continued growth for the Hamilton CMA. By the latter year, for example, Hamilton should have approximately 700,000 people in its metropolitan area compared to the approximately 450,000 recorded in 1966.² This is an increase of some 250,000 people in 20 years, or an average of 12,500 people per year. That experience, if achieved, would be slightly greater on

1. The Hamilton Chamber of Commerce, *Agenda for Action*, 1966, p. 1.

2. *Ibid*, p. 2A.

TABLE 1

**POPULATION OF HAMILTON, HAMILTON CMA,
ONTARIO AND CANADA — YEARS 1951, 1956, 1961, 1966**

Region	1951	1956	1961	1966
Hamilton	208,321	239,625	273,991	298,121
Hamilton CMA	280,293	338,294	395,189	449,116
Ontario	4,597,542	5,404,933	6,236,092	6,960,870
Canada	14,009,429	16,080,791	18,200,621	20,014,880

Percentage Increase for the Above Areas

Hamilton City	Percent	Ontario	Percent
1951–1956	15	1951–1956	17.5
1956–1961	10.2	1956–1961	15.3
1961–1966	8.8	1961–1966	11.6
Hamilton CMA	Percent	Canada	Percent
1951–1956	20.6	1951–1956	14.7
1956–1961	16.8	1956–1961	13.1
1961–1966	13.6	1961–1966	9.96

Sources: Population for 1951, 1956, and 1961 from the census, DBS.
Population for 1966 from the *Canadian Yearbook*, 1967–1968.

an annual basis than the increase achieved from 1951 to 1956. The rate of growth for the Province of Ontario, according to the Ontario Department of Economics and Development, should be about the same as that for the Hamilton CMA. By this measure, then, there seems to be little indication that the Hamilton area has yet reached a limit to its growth. On the contrary, projected growth to 1980 will exceed the growth that has already occurred if the projections hold true. Additional commercial activity will be needed to serve the expanding population.

2. Employment

Table 2 shows that growth in the City of Hamilton in commercial activities amounted to 28.5% from 1951 to 1961 as measured by the increase in the number of employees in the wholesale, commercial (service), and the retail industries. Proportionate growth in commercial activities exceeded the growth in total employment by more than twice. Aside from the finance, insurance, and real estate industries and service and personal industries, the growth in commercial activity was the greatest of all.

Manufacturing declined 11.7% from 1951 to 1961. The relative performance of the commercial sector and the other service-type sectors vis-a-vis manufacturing for this period is not very surprising. Manufacturing is a slow-growing sector compared to most others. This reflects a widespread phenomenon. At least in the western nations, growth is to be found more in the service sectors than in the manufacturing sector. This trend, of course, has great portent for Hamilton because so much of its activity is centered in heavy manufacturing.³ Thus far the city is accommodating well to the performance of its manufacturing sector. While overall growth has slowed, there is little evidence of economic hardship.

While commercial growth in the City of Hamilton from 1951 to 1961 was substantial at 28.5%, it lagged behind that in growth of the metropolitan area as a whole. Again, Table 2 shows that Metro-Hamilton exhibited a faster rate of growth than that of the city. We have noted above that this is to be expected, if for no other reason, than the absence of land that can economically be developed

3. An examination of the latest available information indicates that this trend is discernible in the present. Employment indexes for manufacturing in the Hamilton CMA for March 1966; March 1967; and March 1968 are, respectively: 123.6, 122.5, and 119.4. Thus, the overall growth in manufacturing employment for Metro-Hamilton recorded for the period 1951 to 1961 has been reversed for the past three years. Though no data is available to distinguish the City of Hamilton from Metro-Hamilton, it would not be surprising to find that absolute growth in manufacturing employment in the outlying areas has been offset by a greater absolute decline in the city.

Data are not seasonally adjusted and were obtained from DBS, *Employment and Average Weekly Wages and Salaries*, March 1968.

in the City of Hamilton. Total employment growth in Metro-Hamilton was much greater than that for the City of Hamilton. Growth in manufacturing employment for Metro-Hamilton, while small, was positive versus the negative experience for the City of Hamilton. Manufacturing growth in Metro-Hamilton, then, reflects the pattern exhibited by general population growth. The outlying metropolitan areas are growing faster than the city itself.

Turning again to commercial activity, note that growth in the City of Hamilton between 1951 and 1961 lagged behind the CMA, the Province as a whole, and the entire country of Canada. The growth rate for commercial activity in the City of Hamilton is lagging behind that of Metropolitan Hamilton, the Province, and the nation as a whole. We will see below that Hamilton has fewer sales per capita than in other places in Ontario.

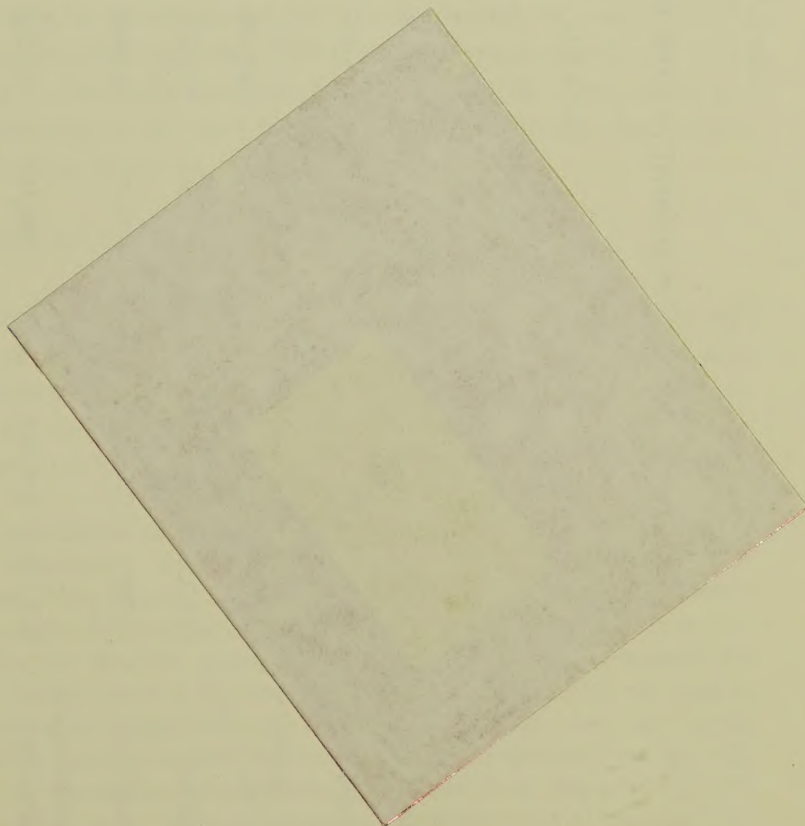


TABLE 2

EMPLOYMENT BY TYPE OF INDUSTRY*

	CANADA			ONTARIO			METRO HAMILTON			HAMILTON		
	1951	1961	Percent Change	1951	1961	Percent Change	1951	1961	Percent Change	1951	1961	Percent Change
Total Employment	5,276,639	6,458,156	22.4	1,882,508	2,393,015	27.1	113,993	151,637	33.0	95,325	108,773	14.1
Agriculture, etc.	826,093	648,910	-21.3	202,544	172,171	-14.9	1,581	4,116	160.3	299	561	87.4
Fishing, Logging, Mining, etc.	219,344	181,270	-17.3	39,952	41,067	2.8	97	287	195.9	44	89	102.3
Construction	291,352	335,877	15.3	103,757	119,501	15.2	7,246	10,585	46.0	5,749	7,707	34.0
Manufacturing	907,005	1,036,942	14.3	402,386	441,440	9.7	59,553	61,032	2.5	51,385	45,372	-11.7
Transportation and Public Utilities	412,379	496,823	20.5	138,460	164,529	18.8	6,939	9,374	35.1	5,750	6,678	16.1
Commercial, Wholesale & Retail	315,268	439,672	39.4	118,586	172,635	45.6	16,250	24,028	47.8	13,362	17,181	28.5
Finance, Insurance and Real Estate	32,305	52,956	63.9	13,729	23,000	67.5	2,775	4,969	79.9	2,282	3,391	48.6
Service and Personal	897,000	1,388,219	54.6	307,922	518,522	68.4	15,242	28,830	89.1	12,620	21,507	70.4

*Table from The Hamilton Chamber of Commerce, *Agenda for Action*, 1966, p. 6

Source: Statistics from 1951 and 1961 census, DBS.

III. HAMILTON'S COMMERCIAL ACTIVITY

A. INTRODUCTION

Any person who engages in statistical research soon comes to realize that the data is not always presented in a form that allows him to focus upon a particular geographical jurisdiction. That is the case in this analysis: most data for Hamilton is for the Census Metropolitan Area basis. Some data for the City of Hamilton is provided by *The Survey of Buying Power*. They consist of projections from 1961 data recorded by the Canadian Census. Because the figures presented are highly aggregated, however, they do not permit a close analysis of retailing, wholesaling, and service activities in the city. For that purpose we must turn to the Census itself. Census material, however, is available only on a CMA basis, and the analysis, therefore, shall be conducted at that jurisdictional level. Even though 1961 data is the latest available at the level of aggregation desired, it will be simple for the Hamilton Economic Development Commission to repeat the analysis for 1966 when figures become available.

It is not possible to develop an absolute standard that will precisely indicate a sufficient or insufficient level of commercial activity. We therefore provide judgments based upon a comparison of Hamilton's experience with that of Toronto, London, the Province of Ontario, and Canada as a whole. We used a number of indicators to compare Hamilton with these areas. A comparison of total commercial activity in these places, of course, would be inappropriate simply because they are not the same size. Therefore, we put commercial activity on a per-capita and a per-store basis to standardize the data. On a per-capita or a per-store basis it is legitimate to see how Hamilton measures up to other places, whether they be smaller, the same size, or larger.¹

B. INTERPRETING THE DATA

The first data to be analyzed are those contained in Table 3. The comparison on an overall basis is quite striking. Hamilton, clearly, does not exhibit the sales per capita that are obtained in the cities of Toronto and London. It is barely above the experience for the Province of Ontario as a whole and for the nation of Canada. It is much nearer to the latter than it is to the former.

-
1. While we have not yet approached the question of policy measures to correct the situation revealed by the area comparisons, it is appropriate at this point to cite the purpose of making such comparisons. That purpose, briefly, is both to answer the question of whether or not Hamilton is deficient in commercial activities, and to add detail by showing precisely where deficiencies exist. The data also shows areas of strength. Basically, the analyses are performed to uncover hidden demand for retailing, wholesaling, and service activities in Hamilton. A close analysis of relative strength and weakness of Hamilton's commercial offerings may also lead an organization like the Hamilton Economic Development Commission to inquire about the reasons for the exhibited performance. Once this is known, it is often possible to take direct policy action to improve the performance of the particular commercial industry involved. This, too, may be interpreted as an unlocking of a hidden demand for a particular product.

TABLE 3

PER CAPITA SALES FOR CANADA, ONTARIO AND HAMILTON, TORONTO, AND LONDON CENTRAL CITIES OF STANDARD
METROPOLITAN AREAS — 1966 ESTIMATES

	Total Canada	Province Ontario	Central City Hamilton	Central City Toronto	Central City London
TOTAL RETAIL SALES	1,113.81	1,216.21	1,381.90	2,553.89	1,932.85
Food	283.26	307.24	353.84	457.26	375.22
Eating and Drinking Places	37.00	38.84	47.94	149.15	35.05
General Merchandise	184.97	168.50	284.75	630.23	251.10
Apparel	74.34	82.43	96.36	210.68	136.84
Furniture, Household Appliances	44.22	50.53	64.83	124.78	84.28
Automotive	218.87	247.59	215.14	458.48	638.11
Gas Stations	77.99	90.05	82.99	68.77	122.42
Lumber, Building, and Hardware	50.81	52.83	33.23	44.84	48.96
Drugs	30.96	33.53	44.70	53.52	47.40
Miscellaneous*	111.39	144.67	158.12	356.18	193.47

*Broad groups do not sum to total Retail Sales, Remainder under miscellaneous.

Source: Population and retail sales "Sales Management," *Survey of Buying Power*, June 1967, pages E-14, 39, 40, 42.

Because the Province and the nationwide averages include minor trading centers, Hamilton's performance is even more startling. In 1966 retail sales in the City of Hamilton amounted to \$1,381.90 per resident. The City of Toronto, with a recorded per-capita experience of \$2,553.89 showed almost twice the retail activity as that exhibited in this measure. Thus, there is no question that on a per-capita retail sales basis Hamilton is deficient.

With reference to its closest competitor, the City of Toronto, Hamilton was especially deficient in sales per capita for eating and drinking places, for general merchandise, apparel, furniture and household appliances, automotive, and miscellaneous retail activities. While it is dangerous to generalize at this point, there is a hint in this data that Hamilton suffers most on a per-capita retail sales basis with the City of Toronto in those lines of retailing activity that offer the amenities of life, and it is closest in experience to Toronto in the day-to-day type of retailing activities.² The only industry for which Hamilton seriously compares unfavorably with London was automotive.

1. Analysis of the 1961 Census Data — Per-Capita Retail Sales

Table 4 lists per-capita retail sales for 1961 for the Hamilton, Toronto, and London CMA's and for the Province of Ontario and for Canada. The difference in geographical coverage between this table and Table 3 must be underscored. Here we are dealing with much more than the cities of Hamilton, Toronto, and London. Surrounding suburban cities and rural areas are also included. Data limitations make this type of analysis necessary. Figures are not provided for central cities in the 1961 Census. Nevertheless, the data is highly suggestive of the results that would be obtained if the comparison were made on a city basis. Evidence for this lies in the consistency of results between information obtained from the CMA comparisons and that obtained above for the city comparisons.

The data for total retail sales per capita in Table 4, Part A show that the Hamilton CMA lagged behind Toronto and London CMA's in 1961 as did the City of Hamilton lag behind the cities of London and Toronto in 1966. The positions of London and Toronto were reversed, but this is primarily due to London's outstanding performance in the automotive group. In none of the broad groups

-
2. The reader is cautioned not to leap to the conclusion that Hamilton does not offer the amenities of life to its citizens. There are many fine restaurants, furniture stores and apparel stores in Hamilton. Toronto's prominence in many of these "amenity" lines is obviously due to its position as a retailing, entertainment, and tourist center. Its higher per-capita sales are most likely a function of its ability to attract outsiders rather than any greater expenditures by its own residents.

TABLE 4

A. PER CAPITA RETAIL SALES FOR 1961, for CANADA, ONTARIO, HAMILTON CMA, TORONTO CMA, AND LONDON CMA

	(\$)				
	Total Canada	Province Ontario	CMA Hamilton	CMA Toronto	CMA London
Total	881.15	995.24	995.54	1,159.19	1,340.99
Broad Groups					
Food Group	235.63	262.80	280.41	295.33	272.70
General Merchandise Group	148.93	137.56	167.39	176.77	170.18
Automotive Group	252.32	291.33	256.03	315.14	525.78
Apparel and Accessories Group	63.95	72.04	67.45	89.62	99.10
Hardware and Home Furnishings Group	61.17	71.09	65.92	78.55	90.17
Other Retail Stores Group	119.15	160.42	158.34	203.78	183.06
Food Group	235.63	262.80	280.41	295.33	272.70
Bakery Products Stores	6.96	6.93	6.89	10.39	9.81
Candy, Nut Stores	0.66	0.84	1.02	1.31	1.38
Confectionery Stores	5.85	6.85	8.84	6.17	5.67
Dairy Products Stores	1.50	2.46	1.63	2.62	*
Egg and Poultry Stores	0.26	0.50	*	1.08	1.63
Fruit and Vegetable Stores	2.09	3.26	2.58	6.32	7.91
Grocery Stores, without Fresh Meat	43.23	29.26	22.09	22.04	14.67
Combination Stores (grocery with fresh meat)	159.81	194.99	211.84	220.83	210.25
Meat Markets	13.71	15.77	22.05	21.21	16.84
Fish Markets	0.42	0.38	0.37	0.72	0
Delicatessen Stores	0.95	1.41	2.56	2.34	3.18
Other Food Stores	0.19	0.15	*	0.30	*

* Data not available because of disclosure

TABLE 4 (Continued)

	Total Canada	Province Ontario	CMA Hamilton	CMA Toronto	CMA London
General Merchandise Group	148.93	137.56	167.39	176.77	170.18
Department Stores					
Mail Order Offices or Houses Operated by Department Store Firms	85.00	84.57	138.37	141.53	*
Other Non-department Stores Operated by Department Store Firms					
General Merchandise Stores	10.13	10.88	1.99	11.38	15.71
General Stores (more than one-third foods)	33.30	16.32	3.03	1.67	*
Variety Stores	20.50	25.79	24.00	22.19	36.87
Automotive Group	252.32	291.33	256.03	315.14	525.78
Automobile Dealers	94.13	102.93			166.45
Automobile Dealers, with Wholesale Car Depts	42.60	51.96	131.03	180.56	191.91
Automobile Dealers with Farm Implements	5.74	2.60			0
Used Car Dealers	8.66	14.63	14.35	23.38	*
Accessories, Tire and Battery Shops	12.23	18.52	13.28	14.65	38.24
Second-hand Parts and Accessory Shops	0.63	0.76	*	0.26	3.00
Service Stations	67.49	79.34	76.76	74.25	95.20
Garages	14.31	12.46	11.92	10.90	9.02
Paint and Body Shops	3.41	4.62	4.70	5.59	3.63
Other Specialty Repair Shops	2.52	2.66	3.01	4.20	4.12
Cash Wash	0.44	0.65	*	1.26	*
Automotive Establishments, n.e.c.	0.16	0.20	0.24	0.09	0
Apparel and Accessories Group	63.95	72.04	67.45	89.62	99.10
Men's and Boys' Clothing Stores	12.21	16.19	13.54	19.49	18.05
Men's and Boys' Furnishings Stores	0.35	0.38	0.38	0.74	*

* Data not available because of disclosure

TABLE 4 (Continued)

	Total Canada	Province Ontario	CMA Hamilton	CMA Toronto	CMA London
Apparel and Accessories Group (Continued)					
Men's and Boys' Hat Stores	0.06	0.13	*	0.22	*
Women's Ready-to-wear Stores	16.20	21.16	18.92	32.42	*
Lingerie and Hosiery Stores	0.97	0.31	0.31	0.40	*
Millinery Stores	0.75	0.74	0.86	0.94	1.30
Furriers and Fur Stores	2.72	3.13	3.61	4.07	5.42
Accessories and Other Apparel Stores	0.10	0.12	*	0.22	0
Children's and Infants' Wear Stores	2.30	2.42	1.69	3.59	3.75
Family Clothing and Furnishing Stores	13.76	10.74	9.08	5.91	14.82
Men's Shoe Stores	0.23	0.24		0.38	
Women's Shoe Stores	0.95	1.02		1.78	
Children's and Infants' Shoe Stores	0.19	0.30	13.97	0.67	20.47
Family Shoe Stores	9.33	11.59	13.15	13.11	15.94
Custom Tailors	0.91	1.21	2.50	2.21	4.62
Second-hand Clothing Stores	0.35	0.35	0.60	0.42	*
Piece Goods Stores	2.47	1.88	1.73	2.75	3.17
Miscellaneous Apparel and Accessories Stores	0.10	0.13	*	0.30	*
Hardware and Home Furnishing Group	61.17	71.09	65.92	78.55	90.17
Hardware Stores	16.19	16.23	10.48		14.58
Hardware and Farm Implement Stores	0.24	0.20	0	14.02	0
Paint, Glass and Wallpaper Stores	1.84	2.69	2.65	3.19	3.72
Furniture and Undertaker Stores	0.62	0.97		0.33	0
Furniture Stores	12.67	15.68	14.90	19.35	17.85
Household Appliance Stores	7.99	11.56	11.10	13.15	16.00
Television Sales and Service Shops	1.72	2.10	1.53	2.71	2.06

*Data not available because of disclosure

TABLE 4 (Continued)

	Total Canada	Province Ontario	CMA Hamilton	CMA Toronto	CMA London
Hardware and Home Furnishing Group (Continued)					
Furniture, Television, Radio and Appliance Stores	10.10	9.82	9.03	9.93	13.31
Television, Radio, Piano and Music Stores	1.57	2.13	4.31	2.92	4.87
TV and Radio Repair Shops	1.60	2.06	2.55	2.38	2.26
Household Appliance Repair Shops	0.94	1.12	1.88	1.51	2.73
Electrical Supply Stores	0.85	0.78	0.28	0.98	1.20
China, Glassware and Kitchenware Stores	0.36	0.66	0.85	0.41	1.91
Floor Coverings, Curtains, Upholstery and In- terior Decoration Stores	3.43	3.97	5.25	5.93	7.33
Linen Stores	0.06	0.06	0	0.06	0
Picture and Picture Framing Stores	0.10	0.13	0.28	0.23	*
Antique Shops	0.26	0.31	0.28	0.61	*
Second-hand Furniture Shops	0.50	0.55	0.44	0.71	2.14
Miscellaneous Home Furnishings Stores	0.13	0.07	0.11	0.13	0
Other Retail Stores Group	119.15	160.42	158.34	203.78	183.06
Drug Stores without Meals or Lunches	24.15	28.16	30.76	37.86	29.57
Drug Stores with Meals and Lunches	1.47	1.86	2.36	2.27	6.30
Patent and Proprietary Medicine Stores	0.25	0.30	0.20	0.35	0
Fuel Dealers (other than oil)	7.57	10.47	7.09	8.28	6.46
Fuel Oil Dealers	11.43	18.40	25.26	27.44	7.59
Ice Dealers	0.03	0.04	0	0	0
Florists	2.84	4.08	5.25	4.84	6.37
Luggage and Leather Goods Stores	0.45	0.61	1.01	0.87	1.77
Tobacco Stores and Stands	5.73	9.13	7.71	17.49	9.32

*Data not available because of disclosure

TABLE 4 (Continued)

	Total Canada	Province Ontario	CMA Hamilton	CMA Toronto	CMA London
Other Retail Stores Group (Continued)					
Newsdealers	0.73	0.74	*	1.80	1.54
Book and Stationery Stores	2.95	3.82	3.26	5.16	*
Artists Supplies Stores	0.09	0.08	0	0.21	*
Camera and Photographic Supplies Stores	1.75	2.72	2.86	4.51	4.74
Music Stores	1.20	1.44	2.83	2.01	1.02
Gift, Novelty and Souvenir Shops	1.98	3.07	2.22	4.34	3.26
Jewellery Stores	7.94	9.57	9.64	11.45	13.79
Jewellery Repair Shops	0.29	0.30	0.48	0.54	0.28
Sporting Good Stores	2.78	3.61	4.89	4.41	*
Bicycle Shops	0.30	0.25	0.30	0.11	0.57
Boats, Outboard Motors, Boating Accessories	1.82	3.31	1.30	2.86	2.96
Motorcycle Dealers	0.29	0.17	*	0.32	*
Pet Shops	0.24	0.28	0.48	0.40	0.80
Monument and Tombstone Dealers	0.31	0.54	0.80	0.46	*
Religious Goods Dealer	0.19	0.17	0.17	0.15	*
Opticians	0.61	0.66	0.82	1.08	1.22
Health Appliance Stores	0.35	0.41	0.57	0.58	0.50
Government Liquor Stores	29.28	29.31	26.13	37.44	29.48
Brewer's Retail Stores or Agents	7.23	20.47	14.10	17.81	28.89
Wine Stores	0.30	0.87	0.94	1.38	1.87
Hobby Shops	0.25	0.28	0.72	0.23	0.45
Toy Shops	0.12	0.13	0.71	0.14	0
Record Bars	0.17	0.25	0	0.40	0.45
Bicycle Repair Shops	0.05	0.04	*	0.02	*
Wool Shops	0.12	0.14	0	0.13	*
Miscellaneous Stores, n.e.c.	3.89	4.74	4.77	6.44	10.36

* Data not available because of disclosure

Source: Census of Canada, 1961, Series 6.1, Retail Trade — Population-Canada Year Book 1963-64, Tables 4 and 8, pages 160-162.

TABLE 4 (Continued)

**B. COMPARISON OF HAMILTON'S PER CAPITA RETAIL SALES WITH TORONTO AND LONDON
CMA BASIS, 1961 BY TYPE OF ESTABLISHMENT**

Hamilton Higher (16)	Hamilton Lower (43) (Continued)
Confectionery Stores	Accessories, Tire, and Battery Shops
Grocery Stores, Without Fresh Meat	Second-hand Parts and Accessory Shops
Meat Markets	Other Specialty Repair Shops
Delicatessen Stores	Men's and Boys' Clothing Stores
General Stores	Millinery Stores
Garages	Furriers and Fur Stores
Automotive Establishments, n.e.c.	Children's and Infants' Wear Stores
Second-hand Clothing Stores	Men's and Women's and Children's and Infants' and Family Shoe Stores
TV and Radio Repair Shops	Piece Goods Stores
Picture and Picture Framing Stores	Hardware and Hardware and Farm Implement Stores
Music Stores	Paint, Glass, and Wallpaper Stores
Sporting Goods Stores	Furniture and Undertaker and Furniture Stores
Monument and Tombstone Dealers	Household Appliance Stores
Religious Goods Dealers	Television Sales and Service Shops
Hobby Shops	Furniture, Television, Radio, and Appliance Stores
Toy Shops	Electrical Supply Stores
Department Stores and Mail Order Operated by Department Stores	Floor Coverings, Curtains, Upholstery, and Interior Decoration Stores
Hamilton Lower (43)	Second-hand Furniture Shops
Bakery Products Stores	Tobacco Stores and Stands
Candy, Nut Stores	Newsdealers
Egg and Poultry Stores	Cameras and Photographic Supply Stores
Fruit and Vegetable Stores	Gift, Novelty, and Souvenir Shops
General Merchandise Stores	Jewelry Stores
Automobile Dealers and Automobile Dealers with Wholesale Car Departments and Automobile Dealers with Farm Implements	Boats, Outboard Motors, Boating Accessories Opticians
	Government Liquor Stores
	Brewer's Retail Stores or Agents
	Wine Stores
	Record Bars
	Miscellaneous Stores, n.e.c.

was Hamilton greater than Toronto and London. In four out of the six broad groups it was behind the two other CMA's. Hamilton CMA deficiencies appeared to be most marked in the automotive and apparel and accessories broad groups. The Hamilton CMA performance, it will be noted, was almost the same in per-capita retail sales as Ontario as a whole.

Part B of Table 4 indicates just where Hamilton's advantages and disadvantages lie in comparison to Toronto and London. Following the principle of management by exception, it would be expected that the Hamilton Economic Development Commission would take first note of those commercial industries in which Hamilton displayed some unusual advantage or disadvantage. In this way it may focus its development activities.

Looking first at the 16 categories for which the Hamilton CMA was higher in per-capita retail sales than the Toronto and London CMA's of 1961, note that the list represents those retail offerings that fill day-to-day needs.

It is difficult to explain Hamilton's superiority in the particular retail industries for which it appeared to display good performance. The result is probably due to a random process. These are primarily establishments with a low per-capita annual sales and the advantage could easily swing one way or another in a comparative analysis. None of the retail activities in which Hamilton is highest is a "big ticket" activity. Possible exceptions are monuments and tombstones, sporting goods, and music stores. Even here, however, most items for sale tend to be of relatively small value.

Of the 43 categories for which per-capita retail sales in 1961 in the Hamilton CMA were lower than that for the Toronto and London CMA's, one finds many "amenity" kinds of merchandise and many with the items of large sales value. Many of the big ticket and amenity groups, of course, do not appear in the list for which Hamilton is lower than Toronto or London. This reflects our observation that there is a high level of availability of retail and service items in Hamilton in practically all of the items for which Hamilton has a lower per-capita sales figure.

2. Analysis of the 1961 Census Data — "Per Store" Retail Sales

Where knowledge of retail sales per capita says something about the overall state of demand in the Hamilton CMA economy, an analysis on the basis of sales per store shows how the market responds to a state of demand. A low figure for a city compared to other cities may indicate that competition is brisk in the industries because individual entrepreneurs are quick to seize upon opportunities. If this were the case, retail sales per store would tend to be low. On the other hand, a slack demand in an economy, given even a sluggish response by the market, might result in low sales per store. Given the information that has gone

before in retail sales per capita, the latter interpretation seems to be the more reasonable.

Table 5, Parts A and B shows that in 1961 Hamilton sales per store in the retailing industries were low compared to that for the Toronto and London CMA's. Hamilton was considerably above the Ontario average and the Canada-wide average, however. Analyzing the data for broad merchandise groups, Hamilton did surprisingly well in the important general merchandise groups and, as in the case with per-capita retail sales, did less well in the automotive group. In apparel and accessories, Hamilton did about as well as Toronto and both fell surprisingly short of the London CMA. In food sales, while Hamilton was lower, experience for all three CMA's was approximately the same.

We were unfortunately unable to see what was happening in the important department group, because the figures for department store include those for mail order houses and other non-department stores operated by department store firms. Since Toronto had much more mail order business than Hamilton, we are not really comparing the same group of stores.

Out of the 91 retail sales categories for which data are presented in the Census, Hamilton CMA sales per store are highest for 10, lowest for 38. In both classes, most of the establishments represented tend to be small, with the exception of the important automotive group. In this set of categories Hamilton sales per establishment in 1961 were lower than that for Toronto and London. This follows the same pattern that was indicated in the "per-capita" analysis. There are some surprises. Thus, Hamilton tended to be higher than both London and Toronto in merchandise offered by women's ready-to-wear stores and millinery stores. It was also strong on music stores, sporting goods stores, hobby shops, and toy shops, as was the case also when "per-capita" figures were compared. Alcoholic sales tended to be low on an establishment basis for the Hamilton CMA. In all three categories Hamilton sales were lower than those for the other two CMA's. Hamilton sales per establishment also tended to be lower in the appliance groups, hardware groups, drug stores, and a wide range of variety stores, such as those that merchandise tobacco, cameras, pets, and flowers.

Absence from the higher and lower categories is as interesting as presence in a category. We find, for example, that a broad range of clothing establishments did about as well in Hamilton as London or Toronto.

3. Analysis of the 1961 Census Data — "Per-Capita" Service Sales

According to Table 6, Part A Hamilton CMA recorded fewer service sales per capita than the other two CMA's and, indeed, its experience was poorer than that recorded for the Province of Ontario. The Canada-wide average was barely

TABLE 5

A. PER STORE RETAIL SALES, 1961 FOR CANADA, ONTARIO, AND HAMILTON CMA, TORONTO CMA, AND LONDON CMA
(\$)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Total	105.3	119.0	133.0	151.7	168.1
Broad Group					
Food Group	90.8	127.3	147.6	157.5	160.0
General Merchandise Group	232.5	278.7	1,033.6	1,023.9	474.6
Automotive Group	130.6	138.6	136.5	229.9	259.7
Apparel and Accessories Group	60.7	65.0	65.3	63.6	106.9
Hardware and Home Furnishings Group	72.2	70.9	70.4	81.9	74.6
Other Retail Stores Group	91.6	100.9	100.3	109.7	104.4
Food Group	90.8	127.3	147.6	157.5	160.0
Bakery Products Stores	39.1	37.0	33.2	42.1	48.1
Candy, Nut Stores	30.5	33.2	31.1	32.8	35.7
Confectionery Stores	19.0	25.6	30.9	38.7	35.5
Dairy Products Stores	34.2	42.7	34.0	59.8	*
Egg and Poultry Stores	41.5	43.3	*	46.0	49.3
Fruit and Vegetables Stores	57.6	60.8	46.3	72.9	41.0
Grocery Stores, without Fresh Meat	36.3	42.5	45.2	44.9	42.2
Combination Stores (grocery with fresh meat)	269.5	359.2	427.1	480.2	495.0
Meat Markets	75.9	85.7	101.3	91.5	101.8

* Data not available because of disclosure

TABLE 5 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Food Group (Continued)					
Fish Markets	38.0	29.4	18.2	31.2	0
Delicatessen Stores	49.7	47.5	77.8	38.4	41.2
Other Food Stores	37.6	31.9	*	36.6	*
General Merchandise Group	232.5	278.7	1,033.6	1,023.9	474.6
Department Stores					
Mail Order Offices or Houses Operated by Department Store Firms	1,315.2	1,149.0	5,468.1	17,214.1**	*
Other Non-Department Stores Operated by Department Store Firms					
General Merchandise Stores	217.2	267.2	112.4	407.3	474.6
General Stores (more than one-third foods)	78.0	66.6	52.1	71.0	*
Variety Stores	200.3	192.2	395.3	196.5	145.3
Automotive Group	130.6	138.6	136.5	229.9	259.7
Automobile Dealers	556.4	562.1			1,588.2
Automobile Dealers, with Wholesale Car Departments	1,957.3	2,012.7	1,015.3	1,680.7	4,970.1
Automobile Dealers with Farm Implements	317.2	306.4			0
Used Car Dealers	169.5	183.5	149.3	364.5	*
Accessories, Tire and Battery Shops	146.9	180.8	209.9	226.6	364.9
Second-hand Parts and Accessory Shops	48.2	67.4	*	46.8	181.6
Service Stations	66.1	68.2	72.9	97.7	81.8
Garages	37.4	37.3	38.0	54.5	30.9

*Data not available because of disclosure

**Better part mail order

TABLE 5 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Automotive Group (Continued)					
Paint and Body Shops	33.2	37.1	39.5	61.8	28.6
Other Specialty Repair Shops	43.0	45.8	37.2	72.3	68.0
Car Wash	56.9	69.1	*	71.7	*
Automotive Establishments, n.e.c.	53.9	60.5	23.7	29.1	0
Apparel and Accessories Group	60.7	65.0	65.3	63.6	106.9
Men's and Boys' Clothing Stores	70.9	71.9	52.5	75.8	109.1
Men's and Boys' Furnishings Stores	46.6	60.5	30.3	103.5	*
Men's and Boys' Hat Stores	41.3	42.8	*	44.8	*
Women's Ready-to-wear Stores	71.8	77.9	88.0	86.8	*
Lingerie and Hosiery Stores	32.1	34.7	30.2	30.3	
Millinery Stores	15.9	20.9	24.2	19.2	21.5
Furriers and Fur Stores	69.0	78.4	71.3	72.1	98.3
Accessories and Other Apparel Stores	55.4	51.6	*	66.7	0
Children's and Infants' Wear Stores	32.9	36.5	41.8	35.4	68.0
Family Clothing and Furnishing Stores	86.9	80.7	149.5	45.5	167.9
Men's Shoe Stores	44.7	49.1		69.4	
Women's Shoe Stores	88.1	92.0		104.7	119.7
Children's and Infants' Shoe Stores	43.2	54.9	77.7	58.7	
Family Shoe Stores	63.8	63.2		63.1	
Custom Tailors	23.8	24.5	31.8	25.2	83.8
Second-hand Clothing Stores	19.0	21.8	19.8	24.8	*
Piece Goods Stores	33.3	43.4	34.2	44.8	143.7
Miscellaneous Apparel and Accessories Stores	40.9	44.2	*	50.4	*

* Data not available because of disclosure

TABLE 5 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Hardware and Home Furnishing Group	72.2	70.9	70.4	81.9	74.6
Hardware Stores	69.8 } 70.1	62.2 } 62.5	47.6	53.6	56.2
Hardware and Farm Implement Stores	99.5 }	97.3 }	0		0
Paint, Glass and Wallpaper Stores	42.8	44.2	38.7	44.5	74.9
Furniture and Undertaker Stores	87.9 } 119.2	72.0 } 119.9	140.3	120.7 } 141.4	0
Furniture Stores	121.4 }	125.0 }		141.8 }	129.5
Household Appliance Stores	94.7	97.9	99.7	151.8	103.6
Television Sales and Service Shops	26.4	29.1	28.8	42.2	26.7
Furniture, Television, Radio and Appliance Stores	168.0	166.9	198.3	244.9	172.3
Television, Radio, Piano and Music Stores	107.8	112.4	154.7	110.9	126.1
TV and Radio Repair Shops	16.6	19.1	22.9	25.1	14.1
Household Appliance Repair Shops	34.9	38.5	43.7	62.5	61.9
Electrical Supply Stores	52.5	49.1	27.6	59.8	72.6
China, Glassware and Kitchenware Stores	41.1	44.3	84.3	44.3	115.4
Floor Coverings, Curtains, Upholstery and Interior Decoration Stores	86.9	84.3	86.4	94.1	83.1
Linen Stores	37.7	39.1	0	22.1	0
Picture and Picture Framing Stores	27.3	23.8	15.7	29.8	*
Antique Shops	21.2	16.1	12.4	29.9	*
Second-hand Furniture Shops	19.6	18.8	21.9	25.9	35.2
Miscellaneous Home Furnishings Stores	45.7	31.1	14.5	47.4	0
Other Retail Stores Group	91.6	100.9	100.3	109.7	104.4
Drug Stores without Meals or Lunches	90.1	94.3	97.3	102.3	101.2
Drug Stores with Meals and Lunches	150.7	143.2	103.6	153.1	127.0
Patent and Proprietary Medicine Stores	26.2	34.8	26.8	45.6	0

* Data not available because of disclosure

TABLE 5 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Other Retail Stores Group (Continued)					
Fuel Dealers (other than oil)	163.8	192.1	164.8	387.3	195.1
Fuel Oil Dealers	220.0	306.1	332.7	589.0	196.4
Ice Dealers	14.5	12.1	0	0	0
Florists	35.8	39.5	36.4	43.9	39.8
Luggage and Leather Goods Stores	53.0	45.3	66.2	41.9	80.4
Tobacco Stores and Stands	38.7	42.8	41.2	44.7	43.3
Newsdealers	54.1	64.4	*	99.5	55.9
Book and Stationery Stores	60.6	70.9	51.5	81.1	*
Artists Supplies Stores	42.5	52.2	0	75.3	*
Camera and Photographic Supplies Stores	78.2	85.1	94.2	100.3	95.4
Music Stores	55.4	53.7	80.0	62.2	61.8
Gift, Novelty and Souvenir Shops	25.4	28.7	26.6	32.8	26.9
Jewellery Stores	49.1	55.6	66.8	70.1	75.7
Jewellery Repair Shops	8.2	7.6	9.1	9.6	4.6
Sporting Good Stores	57.3	59.8	71.6	63.9	*
Bicycle Shops	17.0	19.4	17.1	13.0	26.0
Boats, Outboard Motors, Boating Accessories	82.1	88.6	102.4	130.6	179.4
Motorcycle Dealers	79.3	50.6	*	84.0	*
Pet Shops	19.4	17.2	14.5	16.5	24.2
Monument and Tombstone Dealers	38.5	40.6	45.4	70.7	*
Religious Goods Dealers	65.7	51.7	22.8	70.4	*
Opticians	50.0	51.5	53.9	59.6	44.2
Health Appliance Stores	44.1	46.0	32.2	70.2	30.2
Government Liquor Stores	565.8	607.3	1,032.5	1,366.3	1,336.0
Brewer's Retail Stores or Agents	408.4	432.6	428.5	507.9	872.9
Wine Stores	108.6	108.6	93.0	120.1	113.0

* Data not available because of disclosure

TABLE 5 (Continued)

Other Retail Stores Group (Continued)					
	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Hobby Shops	29.0	28.4	40.5	19.6	20.3
Toy Shops	41.3	35.5	55.9	29.4	0
Record Bars	28.5	32.8	0	33.2	20.6
Bicycle Repair Shops	8.6	10.4	*	9.0	*
Wool Shops	21.6	18.3	0	22.2	*
Miscellaneous Stores, n.e.c.	66.4	64.7	85.6	73.9	125.3

* Data not available because of disclosure

Source: 1961 Census of Canada, Series 6.1, Retail Trade

TABLE 5 (Continued)

B. COMPARISON OF HAMILTON'S RETAIL SALES PER STORE WITH TORONTO AND LONDON
CMA BASIS, 1961

Hamilton Higher (10)	Hamilton Lower (38) (Continued)
Grocery Stores Without Fresh Meat	Paint, Glass, and Wallpaper Stores
Delicatessen Stores	Household Appliance Stores
Variety Stores	Household Appliance Repair Shops
Women's Ready-to-Wear Stores	Electrical Supply Stores
Millinery Stores	Second-hand Furniture Stores
Television, Radio, Piano, and Music Stores	Drugstores Without Meals or Lunches
Music Stores	Drugstores with Meals and Lunches
Sporting Goods Stores	Fuel Dealers, Other Than Oil
Hobby Shops	Florists
Toy Shops	Tobacco Stores and Stands
Hamilton Lower (38)	Newsdealers
Bakery Products	Camera and Photographic Supply Stores
Candy, Nut Stores	Gift, Novelty, and Souvenir Shops
Confectionery Stores	Jewelry Stores
Dairy Products	Boats, Outboard Motors, and Boating Accessories
Egg and Poultry Stores	Pet Shops
Combination Stores (Grocery with Fresh Meat)	Government Liquor Stores
General Merchandise Stores	Brewer's Retail Stores or Agents
Automobile Dealers and Automobile Dealers with	Wine Stores
Wholesale Car Departments and Automobile	Record Bars
Dealers with Farm Implements	
Accessories, Tire and Battery Shops	
Second-hand Parts and Accessory Stores	
Service Stations	
Other Specialty Repair Shops (Automotive)	
Furrier and Fur Stores	
Piece Goods Stores	
Hardware Stores and Hardware and Farm	
Implement Stores	

exceeded. Hamilton fared the most poorly compared to Toronto in the amusement and recreation group; the services group; and the hotel, tourist camp, and restaurant group.

Part B of Table 6 lists the service activities for which Hamilton's per-capita sales were higher or lower than those of the Toronto and London CMA's. Of the 118 service categories for which data are available in the 1961 Census, Hamilton exceeded the other two in 17 and was less than they in 19 categories. It must not be inferred that Hamilton lay between the other two CMA's in those categories in which it does not exceed them or trail them because for many categories of service establishments sales in Hamilton, Toronto, and London sales were either nil or not listed in the Census for disclosure reasons. To that extent, less can be said about the services sales than retail sales or wholesale sales. However, the data that are available indicate a number of interesting things. On a per-capita basis the Hamilton CMA services sales compared favorably in laundries and dry cleaning establishments. Service activities characterized by games such as billiards and bowling alleys were also more popular in Hamilton than London or Toronto. Surprisingly, Hamilton's per-capita service sales for cocktail lounges, bars, and nightclubs, as well as those for taverns, beverage rooms, and public houses, exceeded those of the London and Toronto CMA's.

It was noted above in the analysis of retail sales per capita that the Hamilton CMA trailed Toronto and London in sales by government liquor stores, brewer's retail stores, and agents' and wine stores. Putting the two types of analyses together, the finding for services might serve to explain the findings for retail merchandise. Hamiltonians might be said to prefer to consume alcohol publicly rather than at home.

Hamilton service sales per capita were lower in 1961 than those for the Toronto and London CMA's in 19 out of 118 categories. Included in this class are the important business services, like chartered and certified accountants, and addressing, duplicating, and blueprinting services. The other business services, n.e.c. category is also included. Hamilton was somewhere between Toronto and London in all business services for which it did not lead or trail them. Table 6 shows that in such important business services as advertising agencies, credit agencies, employment agencies, and other accounting and bookkeeping services, Hamilton did not do well, compared to Toronto. It also did not do particularly well in a very long list of industries in the personal services group. The same may be said for amusement and recreation services.

There were long lists of services in 1961 for which availability was either nil in Hamilton or offered by such a limited group of establishments that information could not be revealed because it would disclose their sales. The same may be said also, of course, for London, but this does not weaken the point that at least in

TABLE 6

A. PER CAPITA SERVICE SALES 1961, FOR CANADA, ONTARIO, AND
HAMILTON CMA, TORONTO CMA, AND LONDON CMA

	Total Canada	Province Ontario	CMA Hamilton	CMA Toronto	CMA London
Total	163.36	188.51	169.99	285.98	206.61
Broad Groups					
Amusement and Recreation Group	13.89	18.26	12.69	31.59	12.75
Business Services Group	14.95	21.32	14.18	54.71	19.06
Personal Services Group	22.31	27.43	32.78	41.28	38.97
Miscellaneous Group (repair, funeral, photography, and miscellaneous)	21.17	25.05	35.20	39.06	42.51
Hotel, Tourist Camp and Restaurant Group	91.04	96.45	75.14	119.34	93.32
Amusement and Recreation Group	13.89	18.26	12.69	31.59	12.75
Regular Theatre	4.07	4.83	4.57	6.70	5.70
Halls for Motion Picture Exhibition	0.10	0.02	*	*	*
Outdoor Motion Picture Theatres	0.52	0.71	1.07	0.47	1.33
Legitimate Theatres	0.04	0.04	0	*	*
Theatrical Producers, Road Companies, etc.	0.07	0.07	0	*	*
Bands, Orchestras, and Entertainers	0.05	0.08	0	*	0
Film Exchanges	1.91	2.71	*	9.27	0
Motion Picture Booking Agencies	0.01	*	0	*	0
Theatrical Booking Agencies	0.05	0.06	*	0.13	0
Ticket Agencies, Theatrical	0.01	*	0	*	0
Motion Picture Production	0.37	0.65	0	1.88	0
Motion Picture Laboratories	0.21	0.34	0	1.15	0
Other Theatrical Services	0.03	0.07	0	0.25	0

* Data not available because of disclosure

TABLE 6 (Continued)

	Total Canada	Province Ontario	CMA Hamilton	CMA Toronto	CMA London
Amusement and Recreation Group (Continued)					
Billiard Parlours	0.74	0.76	0.74	0.61	0.41
Bowling Alleys	1.82	2.34	3.42	2.69	2.40
Bowling and Billiards	0.26	0.20	*	0.45	0
Dancehalls, Studios and Schools	0.21	0.26	0.21	0.26	*
Athletic Clubs, Arenas, Stadiums and Grounds	0.62	0.92	*	2.41	0
Bathing Beaches and Swimming Pools	0.03	0.01	*	0.02	0
Bicycle Rentals	0.01	0	0	0	0
Boat and Canoe Rentals	0.08	0.10	0	0.03	0
Golf Courses	0.38	0.43	*	0.43	0.44
Race Track Operations	1.33	2.25	0	3.05	0
Riding Academies	0.05	0.05	0	0.08	0.25
Skating Rinks, Ice	0.08	0.13	0	0.31	0
Skating Rinks, Roller	0.01	0.03	0	*	0
Other Commercial Sports Operators, n.e.c.	0.11	0.21	0.10	0.30	0
Amusement Parks	0.19	0.17	*	*	0
Amusement Concessions	0.17	0.39	*	*	0
Coin-operated Amusement Device Services	0.12	0.12	0.24	*	0
Coin-operated Machine Rental and Repair	0.05	0.03	0	0	0
Rental Libraries	0.01	0	0	0	0
Miscellaneous Amusement and Recreation Services n.e.c.	0.19	0.25	0	0.10	0
Business Services Group	14.95	21.32	14.18	54.71	19.06
Advertising Agencies	2.57	4.70	1.97	15.07	*
Outdoor Display and Billboard Advertising	0.68	0.88	*	2.15	*

*Data not available because of disclosure

TABLE 6 (Continued)

	Total Canada	Province Ontario	CMA Hamilton	CMA Toronto	CMA London
Business Services Group (Continued)					
Sign Painting Shops	0.38	0.57	0.40	1.16	0.17
Window Display Service	0.06	0.13	*	0.36	*
Other Advertising Services	1.48	2.42	0.81	7.28	*
Chartered and Certified Accountants	4.03	4.81	6.04	9.94	6.53
Other Accounting and Bookkeeping Services	0.63	0.93	0.95	1.09	0.13
Addressing and Duplicating, Blueprinting, etc.	0.90	1.16	1.25	3.01	1.68
Credit Agencies	0.50	0.46	*	0.67	*
Employment Agencies (private)	0.14	0.19	*	0.48	*
News Syndicates	0.01	0	0	0	0
Other Business Services, n.e.c.	3.57	5.07	1.86	13.50	4.94
Personal Services Group	22.31	27.43	32.78	41.28	38.97
Barber Shops	2.89	3.34	3.37	4.17	3.67
Barber and Beauty Salon Combined	0.24	0.25	0.35	0.20	0.08
Beauty Salons	4.72	6.06	6.45	9.02	7.15
Hairdressing in the Home	0.05	0.05	0.03	0.01	0.05
Dry Cleaning and Dyeing Plants with Laundry, except Rug	2.39	2.98	2.98	4.59	4.35
Dry Cleaning and Dyeing Plants without Laundry, except Rug	2.31	2.90	3.76	3.24	3.36
Pick-up Offices Operated by Dry Cleaning Plants	0.61	0.87	2.03	1.03	1.53
Distributors or Agents for Dry Cleaners	0.59	0.94	0.31	2.71	0.73
Rug Cleaning and Repairing Plants	0.20	0.32	0.35	0.63	0.22
Self-service Dry Cleaners	0.01	*	0	*	0
Dry Cleaning Plants Engaged Primarily in Whole- sale or Industrial Cleaning	0.33	0.28	*	0.76	*

* Data not available because of disclosure

TABLE 6 (Continued)

	Total Canada	Province Ontario	CMA Hamilton	CMA Toronto	CMA London
Personal Services Group (Continued)					
Hand Laundries	0.14	0.21	0.24	0.38	0.09
Laundries, Power, with Cleaning and Dyeing	1.52	1.39	1.86	1.35	*
Laundries, Power, without Cleaning and Dyeing	0.62	0.78	4.66	1.03	*
Industrial Laundries	0.30	0.41	0	0.96	0
Branch or Pick-up Offices Operated by Power Laundries	0.33	0.61	*	0.38	*
Linen Supply Services with Power Laundry	1.18	1.31	0	2.83	*
Linen Supply Services without Power Laundry	0.43	0.77	2.38	1.50	0
Diaper Service with Power Laundry	*	0.13	0	0.38	0
Diaper Service without Power Laundry	*	0	0	0	0
Self-service Laundries	0.61	0.88	1.07	1.04	0.95
Shoe Repair Shops	1.27	1.28	1.38	1.72	1.65
Shoeshine Parlours	0.04	0.05	0.08	0.04	*
Fur Cleaning, Repair and Storage	0.12	0.12	0.05	0.32	*
Hat Cleaning Shops	0.01	0.01	*	*	0
Valet Service, Pressing and Repair Shops	0.39	0.33	0.27	0.61	0.36
Dressmakers	0.14	0.13	0.06	0.25	0.56
Dressmaking in the Home	0.01	*	0.01	0.01	0.05
Cemeteries	0.33	0.47	*	0.86	*
Miscellaneous Personal Services	0.45	0.53	0.68	1.22	0.31
Miscellaneous Group (Repair, Funeral, Photo- graphy and Miscellaneous)	21.17	25.05	35.20	39.06	42.51
Blacksmiths and General Repair Shops	0.42	0.20	0.14	*	*
Horseshoeing Shops	0.01	*	0	0	0

* Data not available because of disclosure

TABLE 6 (Continued)

	Total Canada	Province Ontario	CMA Hamilton	CMA Toronto	CMA London
Miscellaneous Group (Repair, Funeral, Photography and Miscellaneous) (Continued)					
Armature Rewinding and Electric Motor Repair Shops	0.67	1.01	0.66	1.00	1.14
Harness Repair Shops	0.01	*	0	*	0
Locksmiths, Gunsmiths and Tool and Cutlery Repair Shops	0.27	0.33	0.31	0.66	*
Miscellaneous Repair	2.19	2.48	4.12	2.52	2.91
Funeral Directors	3.73	4.15	4.10	*	4.37
Funeral Directing and Furniture Stores	0.09	0.19	0	*	0
Commercial Photographers	0.43	0.73	*	2.01	*
Portrait Photographers	1.01	1.02	1.11	1.65	2.31
Developing, Printing and Enlarging	1.16	1.48	*	4.11	*
Automobile and Truck Rentals (without driver)	2.20	2.13	1.86	4.32	2.21
Taxidermists	0.01	0.02	0	*	0
Collection Agencies	0.28	0.43	0.55	0.49	1.09
Driving Schools	0.11	0.20	*	0.58	*
Detective Agencies	0.30	0.39	0.86	1.05	*
Disinfecting and Exterminating Service	0.13	0.14	*	*	*
Window Cleaning Service	0.15	0.28	0.63	0.41	0
Miscellaneous Services to Dwellings and Buildings	1.41	2.00	1.31	4.10	1.60
Other Miscellaneous Services	6.59	7.85	18.35	11.32	25.22
Hotel, Tourist Camp and Restaurant Group	91.04	96.45	75.14	119.34	93.32
Full Year Hotels, Licensed	28.50	25.66	13.50	27.40	23.82
Full Year Hotels, Non-licensed	1.18	1.01	1.48	0.26	*
Seasonal Hotels, Licensed	0.80	0.42	0	0	0

* Data not available because of disclosure

TABLE 6 (Continued)

	Total Canada	Province Ontario	CMA Hamilton	CMA Toronto	CMA London
Hotel, Tourist Camp and Restaurant Group (Continued)					
Seasonal Hotels, Non-licensed	0.65	1.24	0	*	0
Motels	3.01	3.62	1.78	1.24	6.90
Motels with Service Stations	0.18	0.24	0	*	0
Motels with Retail Stores	0.03	0.03	0	0	0
Tourists Courts, Cabins, etc. with Service Stations	0.77	1.01	*	0.02	0
Tourists Courts, Cabins, etc. without Service Stations	0.03	0.03	0	0	0
Tourists Courts, Cabins, etc. with Retail Stores	0.06	0.08	0	0	0
Tourists Camping Grounds	0.17	0.27	0	0.16	*
Hunting and Fishing Camps	0.69	1.47	0	*	0
Recreation Vacation Camps	0.16	0.43	0	0.32	0
Eating Places	27.71	28.79	26.39	37.09	30.15
Eating Places with Alcoholic Beverages	4.26	3.42	5.71	5.90	5.59
Eating Places with Other Merchandise	10.42	11.65	8.63	13.58	15.62
Refreshment Booths and Stands	0.78	0.72	0.90	0.33	0.83
Fish and Chip Shops	0.40	0.81	1.06	1.70	0.73
Cocktail Lounges, Bars, and Nightclubs	1.26	0.62	1.65	1.48	0
Taverns, Beverage Rooms, Public Houses	5.28	6.85	11.76	9.16	6.59
Caterers	3.84	7.08	2.08	20.61	2.40
Eating Places with Motel and/or Cabins	0.70	1.00	*	*	0
Eating Places with Alcoholic Beverages with Motel and/or Cabins	0.16	0	0	0	0

* Data not available because of disclosure

Sources: Population — Canada Yearbook 1963-64. Tables 4 and 8, pages 160 — 162.
Receipts — 1961 Census of Canada, Series 6.2, Service Trades

TABLE 6 (Continued)

B. COMPARISON OF HAMILTON'S PER CAPITA SERVICE WITH TORONTO AND LONDON
CMA BASIS, 1961, BY TYPE OF ESTABLISHMENT

Hamilton Higher (17)	Hamilton Lower (19) (Continued)
Billiard Parlours	Distributors or Agents for Dry Cleaners
Bowling Alleys	Valet Service, Pressing, and Repair Shops
Barber and Beauty Salon Combined	Armature Rewinding and Electric Motor Repair Shops
Dry Cleaning and Dyeing Plants without Laundry, Ex. Rug.	Portrait Photographers
Pick-up Offices Operated by Dry Cleaning Plants	Automobile and Truck Rentals (Without Drivers)
Laundries, Power with Cleaning and Dyeing	Miscellaneous Services to Dwellings and Buildings
Laundries, Power Without Cleaning and Dyeing	Full Year Hotels, Licensed
Linen Supply Services Without Power Laundry	Eating Places
Self-Service Laundries	Eating Places with Other Merchandise
Shoeshine Parlours	Caterers
Blacksmiths and General Repair Shops	
Miscellaneous Repair	
Window Cleaning Service	
Full Year Hotels, Non-Licensed	
Refreshment Booths and Stands	
Cocktail Lounges, Bars, and Nightclubs	
Taverns, Beverage Rooms, Public Houses	
Hamilton Lower (19)	
Regular Theatre	
Golf Courses	
Riding Academies	
Chartered and Certified Accountants	
Addressing and Duplicating, Blueprinting, etc.	
Other Business Services, m.e.r.	
Barber Shops	
Beauty Salons	
Dry Cleaning and Dyeing Plants with Laundry, Ex. Rug.	

1961 there was a wide range of services being offered that would appear to be useful to Hamiltonians, and that would be worthwhile attracting, if attention is devoted to this type of development. The service sector is important because it provides many of the amenities of life.

4. Analysis of 1961 Census Data – “Per-Store” Service Sales

Table 7 shows that in 1961 Hamilton service sales per establishment trailed those of Toronto, London, the province, and Canada as a whole. Note that on an establishment basis, Hamilton sold fewer services than was true on the average for the Province of Ontario. Hamilton CMA sales barely exceeded those for Canada.

Service sales per establishment in Hamilton lagged behind those in the Toronto CMA to an especially large extent in amusement and recreation, and the important business services group. Hamilton also lagged far behind in the hotel, tourist camp, and restaurant businesses.

While the question of policy will be addressed at length in another chapter, we might point out here that it would appear advisable for the Hamilton Economic Development Commission to pay special attention to the business services group. Increases in the offering of business services would stimulate other desirable development in the city. At the same time, of course, effort should be continued to stimulate the location of headquarters offices for the region of major private and governmental agencies. Business services exist in a very large part to serve decision-makers in headquarters operations. Target firms for policy activity by the Hamilton Economic Development Commission and other development groups, then, should concentrate on these headquarters activities, plus the business services that accompany them.

To some extent, there is a chicken-and-egg problem here. When important business services are available – such as accounting, advertising, printing and publishing, and display services – then headquarters activities will become easier to attract to Hamilton. The attraction of the latter, of course, also serves to stimulate the former. Actually, development organizations would be expected to pursue both types of activity simultaneously.

It is difficult to overemphasize the importance of attracting firms in the business services group. Business services, as well as personal services, are among the fastest growing industries in Canada.³ This growth is reflected in Hamilton, Toronto, and London, as well as for the Province of Ontario. Since business

3. For evidence, see any recent issue of DBS, *Employment and Average Weekly Wages and Salaries*. Employment indexes in the business services industries have increased the most rapidly of all for most jurisdictions.

TABLE 7

A. PER STORE SERVICE SALES, 1961 FOR CANADA, ONTARIO, AND HAMILTON CMA, TORONTO CMA, AND LONDON CMA
(in thousands)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Total	35.2	36.7	35.5	58.1	42.3
Broad Groups					
Amusement and Recreation Group	43.4	59.3	50.7	118.1	64.2
Business Services Group	67.8	74.8	55.5	108.0	65.2
Personal Services Group	12.7	12.9	13.3	17.0	15.7
Miscellaneous Group (repair, funeral, photography, and miscellaneous)	47.3	53.8	74.8	83.7	81.1
Hotel, Tourist Camp and Restaurant Group	48.0	49.3	56.0	95.7	67.1
Amusement and Recreation Group	43.4	59.3	50.7	118.1	64.2
Regular Theatre	55.4	86.0	106.1	130.0	147.7
Halls for Motion Picture Exhibition	7.3	9.6	*	*	*
Outdoor Motion Picture Theatres	40.2	48.9	105.4	143.5	80.3
Legitimate Theatres	79.8	54.9	0	*	*
Theatrical Producers, Road Companies, etc.	177.6	136.6	0	*	*
Bands, Orchestras, and Entertainers	16.9	37.0	0	*	0
Film Exchanges	297.2	512.9	*	528.7	0
Motion Picture Booking Agencies	26.0	*	0	*	0
Theatrical Booking Agencies	54.8	45.4	*	49.2	0
Ticket Agencies, Theatrical	27.5	*	0	*	0
Motion Picture Production	129.6	150.2	0	149.3	0
Motion Picture Laboratories	293.0	266.1	0	300.2	0

* Data not available because of disclosure

TABLE 7 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Amusement and Recreation Group (Continued)					
Other Theatrical Services	42.4	45.0	0	45.0	0
Billiard Parlours	10.2	11.7	11.3	12.4	14.9
Bowling Alleys	37.6	39.0	43.6	48.1	66.8
Bowling and Billiards	35.0	33.9	*	74.2	0
Dancehalls, Studios and Schools	15.0	20.3	27.8	23.4	*
Athletic Clubs, Arenas, Stadiums and Grounds	167.6	205.9	*	488.1	0
Bathing Beaches and Swimming Pools	10.2	6.2	*	9.9	0
Bicycle Rentals	7.6	0	0	0	0
Boat and Canoe Rentals	9.2	8.2	0	18.5	0
Golf Courses	34.9	30.9	*	51.7	26.3
Race Track Operations	866.9	1,559.1	0	1,857.8	0
Riding Academies	7.0	7.6	0	13.8	11.2
Skating Rinks, Ice	10.7	34.2	0	95.2	0
Skating Rinks, Roller	18.6	30.6	0	*	0
Other Commercial Sports Operators, n.e.c.	13.9	17.1	13.4	34.0	0
Amusement Parks	124.5	87.9	*	*	0
Amusement Concessions	68.7	87.1	*	*	0
Coin-operated Amusement Device Services	52.1	52.5	31.0	*	0
Coin-operated Machine Rental and Repair	117.7	67.4	0	0	0
Rental Libraries	6.1	0	0	0	0
Miscellaneous Amusement and Recreation Services n.e.c.	39.5	41.7	0	25.1	0
Business Services Group	67.8	74.8	55.5	108.0	65.2
Advertising Agencies	210.9	276.8	111.1	335.4	*
Outdoor Display and Billboard Advertising	141.9	148.0	*	206.2	*

* Data not available because of disclosure

TABLE 7 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Business Services Group (Continued)					
Sign Painting Shops	19.1	21.1	19.7	33.6	6.3
Window Display Service	84.4	91.3	*	108.8	*
Other Advertising Services	84.9	95.7	35.5	105.4	*
Chartered and Certified Accountants	67.0	69.2	72.3	94.0	91.0
Other Accounting and Bookkeeping Services	20.3	23.5	19.8	27.3	5.8
Addressing and Duplicating, Blueprinting, etc.	68.7	60.0	45.0	78.6	43.5
Credit Agencies	108.4	103.1	*	134.8	*
Employment Agencies (private)	50.8	42.4	*	46.6	*
News Syndicates	61.1	0	0	0	0
Other Business Services, n.e.c.	66.7	70.9	81.8	93.3	63.9
Personal Services Group	12.7	12.9	13.3	17.0	15.7
Barber Shops	5.7	5.6	5.2	7.3	6.1
Barber and Beauty Salon Combined	13.4	13.7	17.1	12.0	5.1
Beauty Salons	9.3	9.6	9.0	13.5	8.0
Hairdressing in the Home	0.9	1.0	0.8	1.0	0.9
Dry Cleaning and Dyeing Plants with Laundry, except Rug	82.4	73.5	98.1	76.2	157.5
Dry Cleaning and Dyeing Plants without Laundry except Rug	36.9	39.6	67.5	49.3	46.8
Pick-up Offices Operated by Dry Cleaning Plants	11.2	9.9	6.3	12.4	10.3
Distributors or Agents for Dry Cleaners	11.3	11.7	7.3	12.1	11.0
Rug Cleaning and Repairing Plants	41.3	45.0	46.4	76.3	13.0
Self-service Dry Cleaners	9.5	*	0	*	0
Dry Cleaning Plants Engaged Primarily in Whole- sale or Industrial Cleaning	62.0	75.1	*	115.0	*

* Data not available because of disclosure

TABLE 7 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Personal Services Group (Continued)					
Hand Laundries	4.2	4.2	3.7	4.7	2.9
Laundries, Power, with Cleaning and Dyeing	188.4	147.0	245.2	144.6	*
Laundries, Power, without Cleaning and Dyeing	86.4	80.8	307.1	72.4	*
Industrial Laundries	113.7	120.8	0	145.6	0
Branch or Pick-up Offices Operated by Power Laundries	31.8	38.6	*	23.9	*
Linen Supply Services with Power Laundry	614.0	480.5	0	515.6	*
Linen Supply Services without Power Laundry	170.6	150.2	188.5	182.2	0
Diaper Service with Power Laundry	*	91.0	0	174.5	0
Diaper Service without Power Laundry	*	0	0	0	0
Self-service Laundries	9.8	10.2	10.8	9.8	9.5
Shoe Repair Shops	6.2	6.3	5.8	6.7	8.5
Shoeshine Parlours	4.2	6.1	4.5	4.7	*
Fur Cleaning, Repair and Storage	17.9	17.9	5.0	29.4	*
Hat Cleaning Shops	8.8	16.6	*	*	0
Valet Service, Pressing and Repair Shops	7.9	7.0	5.6	8.5	4.4
Dressmakers	6.8	5.5	4.5	5.9	12.8
Dressmaking in the Home	0.6	*	1.0	1.0	1.1
Cemeteries	75.0	79.9	*	130.3	*
Miscellaneous Personal Services	18.7	16.8	14.1	23.1	11.4
Miscellaneous Group (repair, funeral, photography and miscellaneous)	47.3	53.8	74.8	83.7	81.1
Blacksmiths and General Repair Shops	6.4	6.5	11.3	*	*
Horseshoeing Shops	2.4	*	0	0	0

* Data not available because of disclosure

TABLE 7 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Miscellaneous Group (repair, funeral, photography and miscellaneous) (Continued)					
Armature Rewinding and Electric Motor Repair Shops	48.0	50.0	26.1	52.1	69.0
Harness Repair Shops	3.8	*	0	*	0
Locksmiths, Gunsmiths and Tool and Cutlery Repair Shops	12.7	12.2	5.5	24.2	*
Miscellaneous Repair	25.4	24.4	49.3	37.7	31.0
Funeral Directors	45.5	61.0	70.5	*	87.9
Funeral Directing and Furniture Stores	48.3	44.6	0	*	0
Commercial Photographers	45.4	55.2	*	77.9	*
Portrait Photographers	18.5	19.5	22.0	24.7	59.8
Developing, Printing and Enlarging	131.1	146.6	*	277.5	*
Automobile and Truck Rentals (without driver)	131.4	143.1	91.7	179.3	100.0
Taxidermists	17.5	27.1	0	*	0
Collection Agencies	36.1	36.6	31.3	44.3	49.6
Driving Schools	14.4	13.0	*	12.5	*
Detective Agencies	132.9	105.4	113.3	120.2	*
Disinfecting and Exterminating Service	50.4	42.8	*	*	*
Window Cleaning Service	39.6	42.7	49.5	62.2	0
Miscellaneous Services to Dwellings and Buildings	96.2	95.0	51.9	149.8	58.1
Other Miscellaneous Services	146.3	135.7	259.0	153.0	217.8
Hotel, Tourist Camp and Restaurant Group	48.0	49.3	56.0	95.7	67.1
Full Year Hotels, Licensed	143.3	180.4	254.1	757.4	269.8
Full Year Hotels, Non-licensed	30.6	41.6	146.2	39.7	*

*Data not available because of disclosure

TABLE 7 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Hotel, Tourist Camp and Restaurant Group (Continued)					
Seasonal Hotels, Licensed	76.0	56.4	0	0	0
Seasonal Hotels, Non-licensed	19.6	23.6	0	*	0
Motels	21.0	21.1	16.8	32.4	52.1
Motels with Service Stations	49.7	41.0	0	*	0
Motels with Retail Stores	27.3	23.5	0	0	0
Tourists Courts, Cabins, etc. with Service Stations	5.2	4.3	*	3.7	0
Tourists Courts, Cabins, etc. with Service Stations	21.0	12.5	0	0	0
Tourists Courts, Cabins, etc. with Retail Stores	19.3	18.3	0	0	0
Tourists Camping Grounds	9.3	13.0	0	42.4	*
Hunting and Fishing Camps	10.1	10.5	0	*	0
Recreation Vacation Camps	47.2	46.5	0	115.1	0
Eating Places	39.3	45.2	44.2	56.6	43.7
Eating Places with Alcoholic Beverages	171.9	211.1	161.1	291.0	202.7
Eating Places with Other Merchandise	34.0	42.2	39.2	55.3	51.5
Refreshment Booths and Stands	18.6	22.3	23.8	33.1	37.8
Fish and Chip Shops	16.4	16.6	10.0	17.2	26.6
Cocktail Lounges, Bars, and Nightclubs	115.4	193.1	162.8	337.7	0
Taverns, Beverage Rooms, Public Houses	73.2	96.5	105.6	163.8	149.3
Caterers	190.5	221.9	63.1	345.0	62.0
Eating Places with Motel and/or Cabins	39.8	46.0	*	*	0
Eating Places with Alcoholic Beverages with Motel and/or Cabins	110.9	0	0	0	0

* Data not available because of disclosure

Source: 1961 Census of Canada, Series 6.2, Service Trades

TABLE 7 (Continued)

B. COMPARISON OF HAMILTON'S SERVICE SALES PER STORE WITH TORONTO AND LONDON CMA'S BASIS, 1961

Hamilton Higher (11)	Hamilton Lower (23)
Dancehalls, Studios and Schools	Billard Parlours
Barber and Beauty Salon Combined	Bowling Alleys
Dry Cleaning and Dyeing Plants with Laundry, except Rug.	Riding Academies
Dry Cleaning and Dyeing Plants without Laundry, except Rug.	Regular Theatre
Laundries, Power, with Cleaning and Dyeing	Golf Courses
Laundries, Power, without Cleaning and Dyeing	Chartered and Certified Accountants
Linen Supply Services without Power Laundry	Barber Shops
Self-service Laundries	Hairdressing in Home
Miscellaneous Repair	Pick-up Offices Operated by Dry Cleaning Plants
Other Miscellaneous Services	Distributors or Agents for Dry Cleaners
Full Year Hotels, Non-licensed	Shoe Repair Shops
	Dressmakers
	Armature Re-winding and Electric Motor Repair Shops
	Portrait Photographers
	Automobile and Truck Rentals (without drivers)
	Collection Agencies
	Miscellaneous Services to Dwellings and Buildings
	Motels
	Eating Places with Alcoholic Beverages
	Eating Places with other Merchandise
	Refreshment Booths and Stands
	Fish and Chip Shops
	Taverns, Beverage Rooms, Public Houses

services and personal services give an important character to a city, development groups in the Hamilton area should work very hard to attract them.

The amusement and recreation group and the hotel, tourist camp, and restaurant group are also important. These, however, appear to depend more upon fundamental scenic and cultural attractions of an area. This is not to say that development efforts should not be directed to the stimulation of convention activity in Hamilton. This, of course, influences the hotel and restaurant group. Except for this matter, however, the relative importance of the business services and personal services groups would lead to the recommendation that major development attention be paid to them.

Part B of Table 7 indicates that Hamilton's sales of services per store were higher than those for the Toronto and London CMA's in only 11 of 118 categories in 1961. Again, a rather mixed and surprising group of service activities seem to be represented. Thus, laundries again led, and dry cleaning was well represented. The presence of other activities, such as miscellaneous repair services, hotel, and barber and beauty salons combined, would appear to be due to random causes.

Looking now at the categories for which Hamilton's CMA sales per establishment were lower in 1961 than those for Toronto and London, we find that Hamilton lagged in 23 categories. Much of this, again, appears to be explained by an element of randomness. Others, however, are more explainable. By virtue of size, for example, one would expect smaller sales in regular theatre for Hamilton than Toronto. Previously noted weaknesses in business services would explain the performance for chartered and certified accountants. Comparatively low sales per establishment in eating places and motels would appear to be due to Hamilton's relatively low popularity as a tourist or stopover point.

5. Analysis of 1961 Census Data — "Per-Store" Wholesale Sales

The comparison of wholesale sales for the Hamilton CMA with the Toronto and London CMA's and with the Province of Ontario and Canada as a whole was carried out only on an establishment basis. This is the most meaningful in the economic sense. Data was not available for highly disaggregated wholesale establishments at the provincial and national levels, so comparisons for these two regions were made only on a total basis. Looking at the first row in Table 8, Hamilton fared slightly better than it did for the previous analyses. While wholesale sales per establishment were greatest for Toronto, Hamilton is second.

TABLE 8

A. WHOLESALE SALES PER ESTABLISHMENT FOR CANADA, AND ONTARIO AND HAMILTON, TORONTO AND LONDON CMA'S FOR 1961

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Total	630.0	606.0	806.0	909.0	804.0
Co-operative Marketing Association and other Dealers in Primary Products			273.0	4,087.0	518.0
Farm Products (raw materials)		*		7,073.0	0
Livestock			0	13,749.0	0
Other			0	397.0	0
Farm Supplies			0	981.0	*
Food Products (except groceries) and Tobacco		*		599.0	*
Wholesale Merchants			616.0	672.0	634.0
Amusement, Sporting and Photographic Goods			114.0	438.0	*
Sporting Goods (general line)			110.0	340.0	0
Toys, Novelties and Fireworks			0	484.0	0
Other Amusement and Sporting Goods			118.0	380.0	0
Photographic Equipment and Supplies			0	465.0	0
Automotive			345.0	1,208.0	441.0
Automotive Parts and Accessories			254.0	1,038.0	418.0
Motor Vehicles			1,029.0	4,147.0	0
Other			245.0	338.0	589.0
Beer, Wine and Distilled Spirits		*			*

* Data not available because of disclosure

TABLE 8 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Wholesale Merchants (Continued)					
Chemicals, Drugs and Allied Products			799.0	1,015.0	1,249.0
Industrial Chemicals			329.0	815.0	0
Drugs and Drug Sundries (general line)			0	6,881.0	0
Drugs and Patent Medicines (specialty lines)			0	146.0	0
Drug Sundries			0	233.0	0
Soaps and Toilet Preparations			0	218.0	80.0
Other Chemicals, Drugs and Allied Products			67.0	925.0	0
Other			2,053.0	0	2,124.0
Coal and Coke			1,104.0	2,572.0	*
Dry Goods and Apparel			326.0	380.0	1,372.0
Clothing and/or Furnishings (general line)			0	398.0	0
Clothing, Men's and Boys'			0	359.0	0
Furnishings, Men's and Boys'			0	349.0	0
Work Clothing			0	222.0	0
Clothing, Women's			0	*	0
Hosiery, Underwear, and other Women's			0	*	0
Apparel and Accessories			0		0
Furs and Fur Clothing			0	392.0	0
Millinery and Millinery Supplies			0	119.0	0
Shoes and Other Footwear			329.0	617.0	0
Dry Goods (general line)			0	435.0	0
Piece Goods			0	340.0	0
Notions			0	233.0	0
Miscellaneous Dry Goods, n.e.c.			0	434.0	0
Other			324.0	0	0

* Data not available because of disclosure

TABLE 8 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Wholesale Merchants (Continued)					
Electrical Goods					
Electrical Merchandise (general line)			341.0	409.0	651.0
Electrical Appliance (general line)			279.0	287.0	0
Radios and Television Sets and Equipment			0	1,180.0	0
Other Household Electrical Appliance (specialty line)			266.0	715.0	506.0
Electrical Wiring Supplies and Construction Materials			0	297.0	0
Electrical Apparatus and Equipment			586.0	409.0	0
Other Electrical Specialties			0	132.0	0
Other			186.0	446.0	216.0
Farm Products (raw materials)			208.0	0	1,181.0
Flowers and Nursery Stock			*	3,653.0	0
Grain			0	148.0	0
Raw Furs			0	9,072.0	0
Miscellaneous Farm Products (raw materials)			0	*	0
Other			0	1,910.0	0
Farm Supplies			447.0	1,017.0	115.0
Food Products (except groceries) and Tobacco					
Confectionery			690.0	1,214.0	804.0
Cigars, Cigarettes and Tobacco			90.0	1,187.0	195
Dairy Products			2,646.0	1,906.0	1,689.0
Poultry Products			218.0	331.0	0
Frozen and Frosted Foods			0	1,983.0	0
Fruits and Vegetables, Fresh (general line)			0	673.0	0
			773.0	322.0	859.0

* Data not available because of disclosure

TABLE 8 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Wholesale Merchants (Continued)					
Fruits (fresh)			0	387.0	0
Vegetables (fresh)			0	1,184.0	0
Meats and Meat Products			150.0	2,203.0	0
Produce			0	434.0	0
Other Food Products			0	392.0	0
Other			590.0	804.0	843.0
Furniture and House Furnishings			118.0	398.0	323.0
Household Furniture			179.0	258.0	0
Office Furniture			0	313.0	0
China, Glassware, Crockery and Pottery			0	422.0	0
Floor Coverings			0	567.0	0
Household Linens, Draperies, etc.			0	347.0	0
Other House Furnishings			0	283.0	0
Musical Instruments and Sheet Music			0	592.0	0
Other			82.0	0	0
General Merchandise			*	406.0	*
Groceries and Food Specialties			2,249.0	1,164.0	8,105.0
Groceries (general line)			0	1,251.0	0
Canned Goods			0	861.0	0
Coffee, Tea, Spices and Cocoa			0	3,146.0	0
Other Groceries Specialties			0	611	0
Other			0	1,492.0	0

* Data not available because of disclosure

TABLE 8 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Wholesale Merchants (Continued)					
Hardware					
Hardware (general line)			1,165.0	600.0	1,190.0
Hardware (specialty line)			1,975.0	1,148.0	2,232.0
			86.0	429.0	149.0
Jewellery			344.0	213.0	0
Jewellery (general line)			0	199.0	0
Jewellery (specialty line)			0	220.0	0
Watch Materials, Jewellers' Tools and Supplies			0	208.0	0
Leather and Leather Goods			52.0	258.0	*
Leather and Leather Goods (general line)			0	279.0	0
Leather and Shoe Findings			0	208.0	0
Lumber and Building Materials (other than metal)					
Building Materials (general line)			401.0	578.0	405.0
Glass			113.0	208.0	276.0
Paints, Varnishes, Lacquers and Enamels			364.0	1,733.0	0
Paints, Glass and Decorators' Supplies			147.0	101.0	0
Wallpaper			0	245.0	0
Insulation, Siding and/or Roofing Material			0	279.0	0
Other Specialty Lines			0	418.0	0
Lumber			455.0	245.0	197.0
Lumber and Millwork			592.0	849.0	0
Other			577.0	667.0	524.0
			0	0	349.0

* Data not available because of disclosure

TABLE 8 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Wholesale Merchants (Continued)					
Machinery, Equipment and Supplies			315.0	423.0	281.0
Commercial Refrigeration Equipment and Supplies			128.0	495.0	67.0
Hotel and Restaurant Equipment and Supplies (non-food)			136.0	148.0	0
Office Machines and Equipment			119.0	192.0	103.0
Store Machines and Fixtures			0	310.0	0
Construction Machinery and Equipment, New			494.0	839.0	0
Industrial Machinery Equipment and Sup- plies (general line)			858.0	787.0	1,134.0
Belting, Hose, Packing and Mechanical Rub- ber Goods			0	281.0	0
Packaging, Wrapping, Canning and Bottling Machinery			0	213.0	0
Metal Working Machinery			380.0	408.0	297.0
Materials-Handling Equipment			0	253.0	0
Mining Machinery, Equipment and Supplies			0	1,324.0	0
Printers' and Lithographers' Machinery, Equipment and Supplies			0	867.0	0
Textile Machinery and Equipment and Supplies			0	*	0
Miscellaneous Industrial Machinery, Equipment and Supplies			181.0	497.0	0
Church Equipment and Religious Goods			0	103.0	0
Dentists' Equipment and Supplies			0	540.0	0
School Equipment and Supplies			0	108.0	0
Scientific and Laboratory Equipment and Supplies			0	1,012.0	0

*Data not available because of disclosure

TABLE 8 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Wholesale Merchants (Continued)					
Surgical, Medical, and Hospital Equipment and Supplies			0	642.0	0
Other Professional Equipment and Supplies			0	268.0	0
Barber and Beauty Salon Equipment and Supplies			73.0	282.0	156.0
Janitors' Equipment and Supplies			0	260.0	0
Laundry and Dry Cleaners' Equipment and Supplies			0	397.0	0
Other Service Equipment and Supplies			0	403.0	0
Farm Machinery and Equipment			0	0	328.0
Aircraft and Aeronautical Equipment and Supplies			0	*	0
Marine Equipment and Supplies			0	182.0	0
Other			403.0	214.0	184.0
Metals and Metal Work			1,518.0	2,742.0	265.0
Iron and Steel (general line)			0	1,822.0	0
Sheet Metal and Metal Work			0	895.0	0
All Other Metals and Metal Work (except non-ferrous products)			627.0	366.0	0
Non-ferrous Metals and Metal Work			0	12,681.0	0
Other			3,302.0	0	0
Paper and Paper Products			438.0	437.0	655.0
Fine Papers			0	2,410.0	1,059.0
Paper and Paper Products (general line)			819.0	573.0	0
Stationery and Stationery Supplies			0	240.0	426.0
Other			247.0	171.0	534.0

* Data not available because of disclosure

TABLE 8 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Wholesale Merchants (Continued)					
Petroleum and Petroleum Products		*	*	*	0
Plumbing, Refrigeration and Heating Equip- ment and Supplies			854.0	446.0	513.0
Plumbing, Equipment and Supplies			715.0	584.0	522.0
Plumbing and Heating Equipment and Supplies (general line)			243.0	311.0	0
Other			1,648.0	222.0	503.0
Waste Materials (including scrap metal)			1,938.0	735.0	683.0
Junk and Scrap (general line)			0	119.0	0
Scrap Metal			2,414.0	849.0	0
Waste Materials (other than scrap metal)			269.0	527.0	0
Other Kinds of Business			159.0	275.0	140.0
Books, Periodicals and Newspapers			277.0	870.0	0
Other Textile and Textile Materials (other than dry goods)			0	142.0	0
Second-hand Goods (except machinery, and automotive)			0	98.0	0
Miscellaneous Kinds of Business, n.e.c.			0	245.0	0
Other			64.0	84.0	0

* Data not available because of disclosure

TABLE 8 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Agents and Brokers			515.0	1,177.0	668.0
Amusement, Sporting and Photographic Goods					
Toys, Novelties and Fireworks			0	820.0	0
Other Amusement and Sporting Goods			0	*	0
Photographic Equipment and Supplies			0	*	0
Automotive			0	1,679.0	0
Beer, Wine and Distilled Spirits			0	*	0
Chemicals, Drugs, and Allied Products			0	448.0	0
Dry Goods and Apparel			1,839.0	608.0	*
Clothing and/or Furnishings (general line)			0	675.0	0
Clothing, Men's and Boys'			0	290.0	0
Furnishings, Men's and Boys'			0	959.0	0
Clothing, Womens'			0	*	0
Hosiery, Underwear and Other Women's Ap- parel and Accessories			0	*	0
Shoes and Other Footwear			0	688.0	0
Dry Goods (general line)			0	758.0	0
Piece Goods			0	*	0
Miscellaneous Dry Goods, n.e.c.			0	287.0	0
Other			0	290.0	0
Electrical Goods			0	1,378.0	0

* Data not available because of disclosure

TABLE 8 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Agents and Brokers (Continued)					
Farm Products (raw materials)			0	5,956.0	0
Farm Supplies			0	*	0
Food Products (except groceries) and Tobacco			125.0	14,223.0	*
Furniture and House Furnishings			0	712.0	*
China, Glassware, Crockery and Pottery			0	887.0	0
Floor Coverings			0	*	0
Household Linens, Draperies, etc.			0	*	0
Other			0	330.0	0
General Merchandise			0	*	0
Groceries and Food Specialties			0	2,597.0	*
Canned Goods			0	5,728.0	0
Other Grocery Specialties			0	1,330.0	0
Other			0	416.0	0
Hardware			*	441.0	0
Jewellery			0	*	0
Leather and Leather Goods			0	*	0
Lumber and Building Materials (other than metal)			*	222.0	*
Machinery and Equipment Supplies			298.0	414.0	*
Miscellaneous Industrial Machinery, Equipment and Supplies			0	*	0
School Equipment and Supplies			0	*	0
Other			0	433.0	0

* Data not available because of disclosure

TABLE 8 (Continued)

	Total Canada (000)	Province Ontario (000)	CMA Hamilton (000)	CMA Toronto (000)	CMA London (000)
Agents and Brokers (Continued)					
Metal and Metal Work		*		2,998.0	0
Paper and Paper Products			0	1,671.0	0
Plumbing, Refrigeration and Heating Equip- ment and Supplies		*		1,426.0	*
Other Kinds of Business			218.0	258.0	0
Manufacturers' Sales Branches			1,783.0	5,025.0	1,562.0
Amusement, Sporting and Photographic Goods					
Automotive		*	0	*	0
Chemicals, Drugs and Allied Products		*		3,297.0	*
Dry Goods and Apparel			0	*	0
Electrical Goods		*		*	*
Farm Products (raw materials)			0	*	*
Food Products (except groceries) and Tobacco			0	4,131.0	*
Groceries and Food Specialties			624.0	9,211.0	1,064.0
Hardware			0	*	0
Lumber and Building Materials (other than metal)			1,192.0	*	1,269.0
Machinery, Equipment and Supplies			0	1,207.0	*
Metals and Metal Work		*		*	0
Paper and Paper Products		*		1,728.0	*
Plumbing, Refrigeration and Heating Equip- ment and Supplies		*		*	*
Other Kinds of Business			0	*	0

* Data not available because of disclosure

TABLE 8 (Continued)

	Total Canada	Province Ontario	CMA Hamilton	CMA Toronto	CMA London
Manufacturers' Sales Branches (Continued)					
Petroleum Bulk Tank Plants and Truck Distributors			4,908.0	6,659.0	2,599.0
Petroleum and Petroleum Products			4,908.0	6,659.0	2,599.0

*Data not Available because of disclosure

Source: 1961 Census of Canada, Wholesale Trade, Series 6.2, Table 6. Ontario and Canada Total, Table 7.

TABLE 8 (Continued)

B. COMPARISON OF HAMILTON'S WHOLESALE SALES PER STORE WITH TORONTO AND LONDON CMA BASIS, 1961, BY TYPE OF ESTABLISHMENT

Hamilton Higher (18)	Hamilton Lower (20)
Wholesale Merchants	Wholesale Merchants
Other Dry Goods and Apparel	Automotive
Electrical Wiring Supplies and Construction Materials	Automotive Parts and Accessories
Cigars, Cigarettes, and Tobacco	Other Automotive
Other Furniture and House Furnishings	Chemicals, Drugs and Allied Products
Jewelry (general line)	Soaps and Toilet Preparations
Paints, Varnishes, Lacquers, and Enamels	Dry Goods and Apparel
Other Specialty Lines of Lumber and Building Materials	Electrical Goods
Other Aircraft and Aeronautical Equipment and Supplies	Radios and TV Sets and Equipment
All Other Metals and Metal Work (except non-ferrous products)	Other Electrical Special Ties
Other Metals and Metal Work	Food Products except Groceries and Tobacco
Paper and Paper Products (general line)	Confectionery
Plumbing, Refrigeration, and Heating Equipment and Supplies	Other Food Products
Plumbing Equipment and Supplies	Furniture and House Furnishings
Other Plumbing, Refrigeration, and Heating Equipment and Supplies	Hardware (specialty line)
Waste Materials (including scrap metal)	Lumber and Building Materials (other than metal)
Scrap Metal	Building Materials (general line)
Agents and Brokers	Barber and Beauty Shop Equipment and Supplies
Dry Goods and Apparel	Fine Papers
	Stationery and Stationery Supplies
	Agents and Brokers
	Groceries and Food Specialties

Toronto's pre-eminence in retailing and service activities was expectedly matched in wholesale activities. The larger size of Toronto would appear to create a higher level of demand for wholesaling, resulting in higher sales per establishment. In wholesaling, much more than in the other lines of activity, the market would appear to require a wholesale establishment only when retailing sales reach a certain volume. It would be difficult for a firm doing business in an area like Hamilton or London to meet that volume and cost would be lowered by importing wholesale services from Toronto.

Part B of Table 8 shows that sales per establishment in wholesale stores were higher in 1961 in 18 categories in the Hamilton CMA and lower in 20. There were over 200 separate wholesale categories, so it cannot be said that Hamilton's experience in either the higher or the lower categories was especially significant. It is difficult, too, to characterize, or to generalize about the nature of wholesale establishments for which sales in Hamilton were higher than those in the Toronto and London CMA's or those for which Hamilton sales were lower. The most that can be said is that in the higher categories Hamilton appears to have exceeded the other two CMA's in a fairly large range of building materials, such as electrical wiring; paint, lacquers, and enamels; other specialty lines of lumber and plumbing, heating, refrigeration equipment, and supplies. There were a few other lines in which Hamilton sales were higher in 1961. The reasons in each case would appear to be specific to each of the categories rather than due to some general, underlying force. Random causes may also have been important.

Looking at the 20 categories for which wholesale sales per establishment in the Hamilton CMA are lower than those in Toronto and London, we find, surprisingly, some lines of building materials. This would appear to add force to the notion that some of the strengths and weaknesses can be best explained by random causes rather than broad underlying forces. The appearance of a series of automotive establishments does not come as a surprise, of course. Hamilton was shown in the retail sales analysis to be considerably behind London and Toronto in the automotive category.

The most noteworthy thing about wholesaling in Hamilton is the absence of so many categories. Since this was also true of London, the basic reason for the general lack of wholesaling must lie in the extent of the Hamilton and London markets. Since the markets for 1968 are larger than those for 1961, if data were available, some of the gaps indicated in Table 8 would undoubtedly be filled in. Other gaps will be filled in as the Hamilton market grows in size. The importance of general market forces in the establishment of wholesale business would appear to suggest that activities by the Hamilton Economic Development Commission and other groups be directed toward the retailing and service industries. As noted above, business services appear to be especially important and therefore it should be devoted to that area.

C. ANALYSIS OF CONDITIONS

We feel that a number of factors influence the condition of Hamilton's commercial activity, but the major ones are as follows:⁴

- The possibility that the retail, wholesale, and service markets are responding sluggishly to demand conditions in Hamilton.
- A series of physical conditions in the City of Hamilton that discourage downtown shopping.
- An image of the city carried about both by residents of Hamilton and outsiders that, to some extent, depresses people's desire to shop in Hamilton.
- The nearness of Hamilton to Toronto.

We are aware, of course, that each of these reasons incorporates a complex set of influences. We also realize that many measures being taken by the City of Hamilton and by private businessmen have already begun to correct some of the most important of Hamilton's deficiencies. These matters will be discussed below.

1. Market Response to Demand in Hamilton

The first of the reasons that may explain Hamilton's relatively low commercial activity is the possible sluggishness of market response to opportunity. Some of the people we interviewed did mention that Hamilton's retail merchants did not use sales techniques designed to stimulate market demand. These impressions, however, were most casual and the respondent generally could offer little evidence to support his statement. While we did not explicitly analyze the marketing techniques of Hamilton merchants and compare them with techniques used by merchants in other cities, we did not get the impression that Hamilton merchants were in any sense backward or inefficient.

There is another sense in which commercial industries in the City of Hamilton may respond sluggishly to market demand, however, and this is caused by the insufficiency of information about the state of that demand. The mechanism by which commercial activities respond to market forces may be slow in operation. Thus, a considerable time lag may exist between the time that demand increases and established stores expand or new stores open to meet that demand. Policy may be directed to reduce this information lag and so slow the time of response.

4. Income was not assigned a place in the above list because we do not feel that a low income level per capita is an important problem in Hamilton. The contrary, indeed, is true. Hamilton's personal disposable income in 1966 amounted to approximately \$2310 per person. This compares with the nationwide average of \$2140, with Toronto's \$2320; and London's \$2170 (see Table 9).

In addition to a general slowness of market response, there is the possibility that certain "pockets" of demand may exist that may require long periods for the market to discover. This is a special case of market lag. Such a "pocket" may exist for years until a man comes along with an idea, starts a business, and finds himself successful. During that time other men may start businesses in areas in which demand is already well met by existing market facilities, and they may fail. Policy then, can increase the efficiency of the process by offering information about both the level of demand and the possibility of demands not being met.

2. Physical Appearance of Hamilton's Downtown Area

Most Hamiltonians know that there is a traffic problem during certain periods of the year and many feel that there is a parking problem in the downtown area. The poor physical condition of many of the buildings is readily apparent, and the impressive Civic Square project is designed to remedy that condition. The same is true of the York Street renewal scheme. We believe that improving physical appearance is an area in which important policy advances can be made.

3. Image of the City of Hamilton

Hamilton's level of commercial activity, is a reflection of a basic, underlying image of the city, carried by residents and others, that characterizes it as a solid, but uninteresting and unexciting city. Hamilton has the image of a workingman's town, a town where people come to buy only the necessities of life. To its own citizens, and to others, it is known as a "lunch bucket" town. This term was used by almost everyone of the extensive group of people we interviewed. We do not believe that the commercial sector deserves this characterization. The fact remains, however, that this is the prevailing attitude in Hamilton.

Much of the evidence about citizens' attitudes was obtained in an extensive series of interviews with more than 60 leaders in both the public and private sectors. These people were asked for their perceptions of typical shopping behavior and the basic, underlying, causes for that behavior. They were also asked for suggestions to improve deficiencies they felt existed and for remarks about policy programs mentioned by the interviewer.

Following are some reactions by one of our interviewers:

Most likely, if Hamilton were located 50 miles further away from Toronto, both the economy and the image of the city would be entirely different; that is, proximity to Toronto has had a profound effect on the development of Hamilton, and although it is useless to speculate what the city would be like if,

in fact, it were further from Toronto, it is nevertheless important to realize that the 'lunch pail' image of Hamilton is, to a large part, a reflection of the cosmopolitan image of its neighbor. This attitude is deeply engrained throughout the community, extending from the blue collar working class to the city fathers, industrialists, the politicians, merchants, etc. Although Hamilton has one of the highest per-capita incomes in Canada and is (presumably) the home of over 100 millionaires, good restaurants, nightclubs, cultural activities in general, stores carrying a large selection of high-quality goods, good hotels, and other amenities which one would expect to find in a city with Hamilton's wealth, are more short in supply than they should be.

Without fail, the people whom I interviewed referred to Hamilton as a workingman's city, a 'lunch pail' economy, or an old-fashioned, conservative, rundown city. The result is a circular argument; namely, because of Hamilton's 'lunch pail' image, the stores have not stocked the expected amounts of high-quality merchandise to a large degree, insufficient first-class restaurants and nightclubs have been established, top entertainers seldom perform in Hamilton, and so on. This, in turn, has influenced shoppers to buy less stylish, less glamorous, less expensive merchandise in Hamilton. The people who can afford higher quality and whose spending habits include nightclubs and fine restaurants, naturally turn quite extensively to Toronto, where they can be guaranteed to find a large enough selection to suit their needs. In turn, the merchants in Hamilton experience a diminished demand for higher quality supply.

Nobody whom I interviewed denied that the reputation which the city carries has retarded certain lines of commercial development. The extent to which this has affected the city's economy depends a great deal on an individual's personal experience. For instance, when talking to the owner of a department store catering to middle-income shoppers, the attitude he expressed was that business could not be very much better and that the amount of sales lost to Toronto was 'peanuts.' The manager of a major department store felt that the business lost to Toronto affected his company only inasmuch as they had geared their merchandise both in quality and product to the buying habits of the large Hamilton market. Looking back, it appears to me that the people who have the strongest feeling about shopping

in Toronto are those who complain that their wives are continually shopping in Toronto department stores. This is not to say that a large retail segment is not lost in Toronto. The city lacks flair and style; the stores are not in attractive or impressive buildings generally; selection is somewhat limited; the attractions in the downtown area are relatively few.

I was particularly struck with the fact that roughly 90% of the people on my scheduled interviews were residents of Burlington, and mostly natives of other parts of Canada. . . . These people only identify with Hamilton in the sense that it is a place where they work. It therefore becomes extremely important that if anything is to be done in Hamilton, it must consider channeling as much regional effort toward these goals as possible.

Finally, while conducting my discussions I became very much aware of the necessity to direct any programs in Hamilton that may come out of this study toward taking advantage of the inherent attributes that presently exist, rather than trying to compete with Toronto. As so many people pointed out, Hamilton will never be able to run a race with Toronto.

Everyone seemed to feel that the urban redevelopment program is the important first step in the right direction. However, most people agree that urban redevelopment is not a panacea, that it will not, by itself, change the image of the city or the spirit of the residents, and that in order for this program to be fully successful, more must be done. In order for the city to change its image, it must begin by changing the image that key individuals of the city have of the city; namely, that the city must begin by changing its own attitude of itself. It must initiate programs and promote campaigns to divorce its own self-inflicted image of a 'lunch pail' town. It must expect to meet its potential in any endeavors, whether they be in the commercial sector, industrial sector, or if they expect to attract any corporate headquarters in the future.

Note the themes that run through these reactions. The perception that Hamilton has an insufficient supply of the amenities of life compared to what one would expect on the basis of its size is there. The problem of the proximity of Toronto is mentioned. The "lunch pail" image is discussed at length, and its pervasive effect is noted. The Burlington-Hamilton problem is discussed. This is mentioned in context with the recommendation that solutions to the problems of this study be considered in any regional context. The necessity to change Hamilton's image before the town may be changed provides the closing theme.

The following are the reactions of another of our interviewers:

I will just reinforce or restate my impressions with regard to what have become familiar subject areas; for example, the 'branch office town,' the 'lunch pail' town, the shadow of Toronto, the lack of zest and aggressiveness, the lack or, perhaps better said, the insufficient enthusiasm for civic and cultural affairs, along with the commitment to Hamilton and its future, lack of social and cultural intermixing among ethnic groups, and lastly, the position of McMaster's University with respect to the affairs of this city.

I would like to state some of the impressions related to me by the people I interviewed.

Hamilton has a style of not risking newness, a newness or change of any sort except, perhaps, in the industrial sector of the city.

There is also a lack of looking ahead or goal definition for its future, and this has been so throughout the history of Hamilton.

Although industry seems to give a great deal of money to the city and to projects in the city, the potential human resources both of talent and energy far exceed their moneys and perhaps more of the talent and time would be better donated to city, civic, and cultural development along with money.

It would be misleading not to state that many remarks by interviewees pointed out strong points about Hamilton. Here are some examples.

A number of people indicated that Hamilton is a sports-minded community and that the Hall of Fame as well as the football team were important aspects of community spirit.

One person felt that Hamilton is on the threshold of expansion and that when the city reaches 300,000 growth will have a snowball effect headed toward the next 100,000. He sees a

rapid increase of per-capita income and feels that the new Civic Square will have a marked effect on the downtown Hamilton area. He also said that the children of lunch pail carriers are now earning money and want to spend it.

The great majority of our respondents expressed a loyalty to the Hamilton area. Many, of course, live in Burlington and other suburban communities and expressed affection for the general area rather than for the City of Hamilton itself. A number of our interviewees, on the other hand, are deeply devoted to Hamilton, have made their fortunes in the city, and expressed a willingness to devote effort to programs aimed at improving the city. A number of them have in the past, or do now, serve on citizen's committees sponsored by the city government, and speak with pride of their accomplishments.

It cannot be denied, however, that many respondents feel that the "lunch bucket" image is here to stay. Interestingly, with reference to the availability of commercial activities in Hamilton, we found that people who reside in Burlington wished to point out the tendency for them or their wives to shop in Toronto. We saw much less of that with people who lived in Hamilton itself. This will help to explain the difference in opinion about typical shopping behavior by many of the policy-makers that we spoke with. Some deny that there is a tendency for people to shop in Toronto; others affirm that this does, in fact, exist. Personal experience, conditioned by the place of residence, appears to be an important determinant of opinion. Burlington residents tend to shop more in Toronto than those who reside in Hamilton, we feel, and they assured us that their neighbors do the same thing.

To find the image of the city held by people who do not reside in the Hamilton area one of our interviewers asked a select group of businessmen in Toronto to encapsulate their images of Hamilton.

Branch Bank Manager: "I think of steel. A rather smoky community. I think of big industry; somewhat progressive."

Financial Journalist: "I think of steel, and messy things like that. Not particularly progressive."

Financial Journalist: "All negative. The parts of Hamilton I ever see, downtown, are unpleasant. There is no outstanding attraction. It has none of the advantages of a small town and all the disadvantages of the big city. Most people I know have the same attitude."

Financial Journalist: "It's smoky. It has a nice hill. It is a nice place. There are a lot of pretty things, and a lot of ugly things. Everyone I know from Hamilton is very nice."

Financial Journalist: "I think of Stelco. Industrial city. Progressive, without a doubt."

Advertising Executive: "I wouldn't visit there. Not as progressive as Toronto. The only way Hamilton gets on the map is through the Ti-cats."

Engineer-Entrepreneur: "I think of steel. Dirt. I wouldn't live there. An industrial town. Downtown's poorly laid out, but it's no less progressive than other communities."

Urban Planner: "Lunch buckets and the mountain. Impossible to drive through. An exciting downtown for a small city. No recognition of its waterfront. Not in touch with the 20th Century. I'm prejudiced against it."

Industrial Accountant: "Terrible place. Wouldn't consider it as a place to live or work."

Television Journalist: "I think of pollution. I associate steel with pollution. It's not pleasant, not progressive. I wouldn't live or work there if I could avoid it because there are no cultural amenities."

Notice the imagery. Smokiness is mentioned a number of times. This is undoubtedly due to the view of Hamilton one sees when he drives across the Hamilton bypass. From the bridge Hamilton is viewed through a curtain of smoke, and it is easy to get the impression that the entire city is covered with a pall. The fact that this is far from the truth does not alter the imagery.

Interestingly, progressiveness comes through as a characteristic of the city. It is our impression that this characteristic was as much emphasized by outsiders as by people residing in the area.

4. Hamilton's Proximity to Toronto

Its closeness to Toronto certainly affects the quantity and type of commercial activity present in Hamilton. Proximity to Toronto is something that will just have to be recognized. In some sense this could be an asset because the attractions of that city are also available to Hamiltonians. Thus, when attracting a

new industry to Hamilton, it could be pointed out that by residing in Hamilton and utilizing the attractions of Toronto, the new resident can have the best of both places. The influence of Toronto on per-capita sales is demonstrated statistically in Tables 9 and 10. The CMA of Windsor, for example, is second to Hamilton by a very small amount in personal disposable income per capita: \$2200 per capita for Windsor, \$2210 for Hamilton (Table 9). On the basis of income, then, Windsor should experience fairly high per-capita retail sales. The left-hand part of Table 9 shows, however, that Windsor has the lowest per-capita retail sales for 1966 of all 19 CMA's in Canada. Proximity to Detroit is without question the reason. Hamilton, then, is not the only city that loses sales to a larger city. In Table 10, another aspect of this influence may be noted. Hamilton, it can be seen, has only 14% higher per-capita sales in the city than in the CMA as a whole. Victoria has an amazing 112% greater sales in the central city than in the CMA in which it resides, and Toronto has 47% more sales of this ratio. Only Edmonton has a lower percentage.

Table 10 indicates that the central city of Hamilton is not capturing the retail sales that do exist. If retail sales are not being made in the City of Hamilton, they must be made some place else. That "some place else" is undoubtedly Toronto. This would appear to be especially true for residents of Burlington. In elapsed time, Burlington people are almost as close to Toronto as they are to the Hamilton central city and it is just as convenient for them to shop there.

TABLE 9

CMA PER CAPITA RETAIL SALES AND PER CAPITA PERSONAL DISPOSABLE INCOME

Per Capita Retail Sales for all CMA'S FOR 1966*
(dollars)

Personal Disposable Income for all CMA'S FOR 1966
(dollars)

CMA	Per Capita Retail Sale	CMA	Per Capita Personal Disposable Income
Canada	1100	Canada	1910
Average	1287	Average	2140
1) Windsor	1100	16) St. John's	1560
2) Montreal	1200	7) St. John	1770
3) Hamilton	1200	4) Quebec	1800
4) Quebec	1210	10) Halifax	1990
5) Kitchener	1230	2) Montreal	2030
6) Ottawa	1240	5) Kitchener	2080
7) St. John	1280	8) Winnipeg	2100
8) Winnipeg	1290	17) Saskatoon	2110
9) Victoria	1330	9) Victoria	2160
10) Halifax	1340	19) London	2170
11) Sudbury	1360	18) Regina	2190
12) Vancouver	1370	14) Edmonton	2200
13) Toronto	1410	1) Windsor	2210
14) Edmonton	1420	3) Hamilton	2310
15) Calgary	1510	12) Vancouver	2320
16) St. John's	1510	13) Toronto	2320
17) Saskatoon	1550	15) Calgary	2330
18) Regina	1570	6) Ottawa	2500
19) London	1620	11) Sudbury	2510

*The 1961 relationship between Hamilton CMA and Hamilton City for the per capita retail sale is \$999.55 to \$1143.27. This relationship is not available for 1966 as the *Survey of Markets* does not provide data for Hamilton City.

Source: *Survey of Markets* 1967-1968, p. 42.

TABLE 10

PER CAPITA RETAIL SALES FOR CMA AND CENTRAL CITIES
AND PERCENTAGE DIFFERENCES, 1961*
(\$)

Name	CMA	City	Percentage Difference
Hamilton	1000	1143	14
Windsor	908	1092	20
Kitchener	1020	1298	27
Quebec	969	1422	47
St. John	1021	1413	38
Victoria	1025	2170	112
Toronto	1159	1706	47
Halifax	1086	1495	38
Vancouver	1057	1359	29
Edmonton	1150	1232	7

*Ottawa, Sudbury, Regina, Saskatoon, St. John's, Calgary, Winnipeg, Montreal, London, have not been included for lack of sufficient data on the cities.

Source: DBS Census of 1961

IV. DEVELOPMENT POLICIES FOR HAMILTON

A. INTRODUCTION

The policy recommendations presented below build upon an existing set of development activities of a rather impressive depth and scope. Many Hamiltonians do not realize that their city is moving. Especially in recent years, an impressive number of programs have been undertaken that will further commercial activity in the City of Hamilton and other aspects of its development.

Table 11 contains a partial listing of these development activities. Some of the projects have recently been completed. Others are under way. Still others are in the planning stage, and major activity to bring them to fruition lies in the future.

At the head of the list is the well-conceived Civic Square renewal project that will, in a few short years, help to contribute a new image of Hamilton. Other projects on the list complement the Civic Square development. Thus, the York Street renewal plan, when it is completed, will provide a fresh, modern entrance to the center of the city. The recently completed Board of Education building also complements the Civic Square development and is really the first major contribution to its overall conception. Other projects on the list, like the Theater Auditorium fund raising drive, the Football Hall of Fame, and the new library on the mountain add a social and cultural dimension to development. The projects testify to the city's ability to conceive and carry forward development projects.

Development projects in Hamilton have, to an uncommon degree, offered citizens of the area an opportunity to devote themselves to projects that further the common good. The city is to be complimented on the emphasis that it has put on this important aspect of its programs. Through such groups as the Urban Renewal Committee, the Economic Development Commission, the Theater Auditorium Fund Raising Committee, and others, citizens from many sectors of the city's life have been given the opportunity to make a public contribution. In the same way that many of the recommendations below arise from and supplement the physical renewal plans and programs of the city, further recommendations derive from the demonstrated willingness of Hamilton's citizens to work enthusiastically for public programs.

B. LONG- AND SHORT-TERM GOALS FOR HAMILTON

Hamiltonians, then, are willing to act. Because of this fact, we have been encouraged to develop an extensive set of recommendations to form the basis for a multifaceted development program. Both short- and long-term goals are addressed. In the short run the Hamilton Economic Development Commission and

TABLE 11

RECENT DEVELOPMENT PROJECTS IN HAMILTON

The Civic Square Development

The York Street Renewal Plan

The Board of Education Headquarters Building

The North-End Renewal Area

The Football Hall of Fame

The Mayor's Project to Secure 1976 Summer Olympics for Hamilton

Confederation Park

The Kenneth D. Soble Apartments for Senior Citizens

The Valens Project of the Hamilton Region Conservation Authority

The Claremount Mountain Access Road

The First Phase of a New Sewage Treatment Plant

A New Library on the Mountain

Creation of the Hamilton Economic Development Commission

The Theatre Auditorium Fund Raising Drive

Source: Hamilton Economic Development Commission.

perhaps other development groups will wish to pursue the detailed analysis in this report to determine the precise types of retail, wholesale, and service activities to attract to the city. In the short run, too, plans should be formed to pursue programs that will extend over a longer period of time. City beautification and indirect methods of stimulating commercial growth lie in the intermediate future. As the Civic Square project develops, certain physical beautification projects may be implemented to complement it. Other physical beautification projects may also be undertaken that do not have a direct connection with Civic Square. There is nothing, of course, to prevent some of these projects from being undertaken immediately.

For the long run, goals must be formed to modify some of the basic conditions that influence the city's commercial development. Our analysis in the preceding sections of this report demonstrated that deep-seated attitudes are responsible for much of the deficiency in commercial activity. Long-term programs must therefore be constructed to operate at this basic level. As a long-term goal, then, policy action must be taken to create an image of Hamilton that more accurately symbolizes the city. The "lunch bucket" should become a symbol of the past. The modernity of the Civic Square development should be utilized to provide a symbol of the future.

The statistics in Chapter II show what is happening to the city. Its basic manufacturing sector is gradually becoming less important as an employer — a trend that is a manifestation of the nation as a whole. The figures must not be interpreted to show that manufacturing production and sales are declining. Most likely, the opposite is the case. Productivity in basic manufacturing is increasing rapidly and increasing levels of production may be achieved with fewer and fewer people. The economic base of the city, then, is undergoing changes of tremendous importance.

Our policy recommendations are grouped in three phases. The recommended programs are flexible in the sense that the city may devote as much activity as it wishes to any one and it may implement one or more of the phases themselves. This reflects our belief that a decision-maker should be provided with a set of alternatives that allow him to devote time and energy to a problem commensurate with its importance. To the extent that public and private officials in Hamilton feel that commercial and other forms of development are important, they will work hard to further their progress. Our recommendations provide ample opportunity for this.

C. THE POLICY PROGRAM FOR HAMILTON

The three phases of the Arthur D. Little, Inc. policy plan are:

- *Phase One:* A detailed examination of the structure of retailing, wholesaling, and service activity to identify areas of hidden demand; following this, a

program to inform firms who are likely to sponsor such activities in the City of Hamilton.

- *Phase Two:* A program to capitalize on the Civic Square project and, in general, to improve the physical appearance of the city.

- *Phase Three:* A program of public and private development activity to further improve the richness of the city's cultural and social life and to give further opportunities for interested citizens to participate in the improvement of their city.

1. Phase One: Direct Development of Commercial Activity in Hamilton

The tables in this report allow the Hamilton Economic Development Commission to carefully analyze the structure of commercial activity in the city to discover sources of hidden demand. As we have already explained, and as the tables indicate, areas of commercial activity in which Hamilton exhibits unusual strength or weakness are good places to begin. The Hamilton Economic Development Commission may wish to encourage development of commercial activity to substitute for present imports. Thus, important activities, such as business services that are now provided in Toronto or some other place, may be developed in the City of Hamilton itself. Following a different philosophy, and one that complements the import substitution approach, is one that capitalizes on demonstrated strength. We believe this has much merit.

To be specific, we believe that great opportunities lie in the fostering of business services. This is a local and national growth industry and many segments are insufficiently represented in the City of Hamilton. We have already mentioned the need for a coordinated effort to attract headquarters types of activities and the business services associated with them, such as advertising, accountancy, legal service firms, printing and publishing, and other business services. We have heard many people express the idea that Hamilton should try to become a "headquarters" town. We feel, however, that there is an insufficient realization that headquarters-type activities flourish best where they are in the midst of an agglomeration of supporting activities. We recommend, then, that the Hamilton Economic Development Commission people visit headquarters people in and out of Hamilton to find their perception of the greatest gaps in supportive services.

It is obvious, of course, that stimulation of headquarters and business service activities will in turn lead to a demand for new office space. A great many people with whom we talked expressed a desire to see more office building in Hamilton. As a long-range goal, we can think of few more worthwhile. We do not know if Hamilton is yet at the threshold of great increase in the growth rate of office activities, but many of the people we interviewed told us that it has been surprising how often old Hamiltonians have been wrong in their pessimism about

the ability of the city to support office building and service activities. Time and time again predictions of failure have been proven wrong. The Terminal Towers Building is a good example of such a project.

While we were not asked specifically to look into the state of office space and to compare that with the needs, statistical material we have seen indicates that Hamilton has some way to go before it has sufficient well-designed, modern commercial space as compared to its needs estimated by such measures as population and employment. We encourage the Hamilton Economic Development Commission to focus considerable development activity in this important area.

The statistics in Chapter III allow the investigation of literally hundreds of retailing, wholesaling, and service activities. While we recommend beginning with investigation of the business service sector there is no reason for the Hamilton Economic Development Commission to stop at this point. It alone can decide how much of its development efforts it wishes to devote to this type of policy measure. We believe, however, that it would do well first to investigate many activities in the Phase Two and Phase Three programs before it exhausts the possibility of Phase One activities.

2. Phase Two: Improving the Physical Appearance and Commercial Uses of Space in Hamilton

A visitor who has been away from Hamilton for a few years will immediately notice the many new structures that have appeared in Hamilton, the taste displayed in their design, and the balanced public and private sponsorship of these structures. Hamiltonians certainly recognize the need to continue to improve the physical appearance and convenience of their city, and this is largely responsible for the speed with which the Civic Square project was conceived and is being implemented. Civic Square, however, is only a beginning. Much more must be done.

a. Renovation of Downtown Buildings

The surprising thing about structures of the type found in Hamilton, especially in the downtown area, is their striking appearance after rather minor improvement efforts. Beautiful effects may be attained simply by painting old brick and frame buildings, especially, with bright and contrasting colors. Examples of such transformation already exist in downtown Hamilton, and we strongly recommend that a campaign be mounted to persuade owners of buildings in the downtown area to emulate these examples. This is really not asking for very much.

While it would be nice to have such beautification steps taken at once, the real necessity to do this will become apparent when the Civic Square project is completed. The fringe area around the project must be upgraded to approach the high standards of appearance that will be set by the Civic Square project. If this is not done, a disjunction between the new and old will clearly diminish the impact of the new.

Property owners should be called together and asked to form plans for physical upgrading. Once a property owner believes that his action is part of an overall plan, he is more likely to engage in improvement activities. The city may wish to take steps designed to provide financial loans or other support in order to encourage this process.

b. Update the York Street Renewal Project

In order to capitalize again upon the advantages that will be offered by the Civic Square project and to enhance those advantages, we recommend that the York Street renewal project be completed sooner than the present plans call for. Since York Street is a major access route to downtown Hamilton, it is important that it be attractive and that its spirit and appearance match that of the section to which it leads.

c. Capitalizing Upon Diversity of National Origin

Hamilton's diverse citizenry was emphasized by many of the people we interviewed. We believe that this fact of Hamilton's life is something that can be utilized to the advantage of all. Diversity in national origin is a democratic virtue and when properly used it stimulates the quality of civic life. We recommend that the Hamilton Economic Development Commission induce a group of businessmen to set up a street, approximately a block in length, adjacent to the new Civic Square project, that emphasizes goods and services that reflect the customs of the important ethnic groups in the city. The shops should feature clothing and artifacts from France, eastern European countries, Germany, and other countries. Restaurants, or at least snack bars, could provide a food with a national theme. This type of endeavor, like physical improvement, requires promotion. A number of people acting together can accomplish what would be very difficult for one person.

d. Beautify Industrial Buildings

Just as commercial buildings in the downtown area may be transformed from a liability to an asset by minor measures to change physical appearance, the same concept may be applied to the industrial buildings along the lakefront. We recommend that as a public service the companies paint the industrial buildings in

bright and distinctive colors. Refineries and chemical plants offer precedent. Tanks, pipes, and other equipment are painted in bright colors, often pastels, and the various parts of the equipment carry a different and contrasting treatment. Because of this, oil refineries and chemical plants have a great deal of visual interest.

Opportunities exist to give a similar treatment to the industrial buildings along the lakefront in Hamilton. The image that would be created, we feel, would do much to lift the spirits of the citizens who live in and visit this area that is such a vital part of Hamilton's economic life. The new image would reflect, we feel, the inherent dynamism of the industrial sector.

e. Attack Air Pollution

Viewed from the bypass one sees Hamilton through a screen of industrial smoke, and this becomes part of the city's unfavorable image. Health factors and the possibility of property damage are important additional reasons for reducing smoke. While we know that air pollution control is now primarily the responsibility of the Province of Ontario, we would urge that high priority be given to the elimination, or at least the substantial reduction, of industrial smoke in Hamilton.

f. Neighborhood Improvement

We recommend that citizens be encouraged to form neighborhood development or rehabilitation programs. Again, a simple matter like paint would greatly improve the appearance, and following this, the spirit, of the people in the neighborhoods. We believe that the Hamilton Economic Development Commission or some other group in the city should promote the formation of such neighborhood rehabilitation groups.

It would be possible to list a great many projects of the physical improvement type. Thus, we could, and do, recommend that vacant plots be considered for interesting uses, such as vest-pocket parks. We recommend that great stress be put on architectural quality in the new Civic Square project, and we encourage the creation of image centers other than the one we have discussed above in connection with the ethnic origin theme. Thus, it could be possible to take a building and convert it into an artist colony. A "hip" theme could be utilized for a commercial center. There are literally no end of themes that could stimulate interest in the shopping attractions of Hamilton. These programs need not, of course, be limited to the downtown area and they need not be tied to the Civic Square project. There is no reason why similar things could not be done at the City Center shopping mall, for example.

g. Financial Stimulation Through a Development Corporation

We believe that some effort should be taken to encourage the growth of interesting and unusual kinds of commercial activity in Hamilton. Many people have ideas to establish commercial activities, such as handmade jewelry shops, import specialty stores, and other types of retail and service offerings. Most, however, do not possess sufficient capital. This problem has been attacked in literally thousands of places in the United States and around the world by the formation of development corporations to provide financing and technical services to people.

A development corporation generally operates by providing finance and technical services to business people. Thus, if a person would like to start a business, but cannot obtain a bank loan, the development corporation may guarantee that loan and see that he obtains it. The development corporation might itself lend part of the money to the individual, or it might lend the entire sum. The development corporation might also enlist the services of people like retired business executives and other experts in various business matters. These people could be of enormous help to fledgling businessmen, preventing many of the failures due to poor management.

Development corporations may be financed in many ways. Some are financed through public grants. Some are public corporations that raise money by issuing bonds and other debt instruments. Some are mixed public and private corporations that pool both public and private moneys to serve as the basis for a loan and guarantee fund. Some are wholly private corporations that utilize equity and loan funds from financial and other institutions to form the basis of their activities.

We understand that the formation of public corporations is difficult in Canada, but there is nothing to prevent the Hamilton Economic Development Commission or some other body from encouraging interested private citizens to form a development corporation. Shares could be sold to banks, insurance companies, other financial institutions and, indeed, to any private firm or individual. On the basis of money raised in this fashion, further money could be borrowed from banks and other financial institutions.

A development corporation so described could operate by lending money to people with good chances for success, but who need help of some kind. Research has shown that people in urban communities like Hamilton have good basic ideas and that economic development may be considerably stimulated by providing conditions under which they can go into business.

In this report, of course, we are talking about the development of commercial activity. A development corporation need not limit itself to such lines, however, but may stimulate and encourage the growth of industry as a whole. We encourage the Hamilton Economic Development Commission to look carefully at the development corporation device.

3. Phase Three: Commercial Activity and Community Spirit

Many people do not shop in Hamilton because they do not think of it as a place where new and exciting things happen. The "lunch bucket" image is pervasive and creates a mental set against shopping for many amenity items, such as high-fashion clothing, furniture, household accessories, restaurant meals, etc. To the extent that this is true, — and we believe that it is true for many potential shoppers — Hamilton's deficiency in commercial activity is really a reflection of a basic attitude toward the city. There is no easy way to change this. Only a well-planned and intelligently designed program to enrich the social life of the city will change people's conceptions. As we point out below, this cannot be performed by depending upon advertising, slogans, and other public relations devices. These are valuable in their place, but they must be used properly. Their best use lies in spreading information about good programs.

As part of this project, we visited the cities of Pittsburgh, Pennsylvania, Bridgeport, Connecticut, and Cleveland, Ohio, to see what was being done in these places to create an environment conducive to a high level of commercial activity.

a. Pittsburgh, Pennsylvania

Pittsburgh's rebirth began in 1940 when three men — a newspaperman, a physician, and a city councilman — made their target a strong and effective smoke control program.

Gradually, their campaign aroused the interest of community leaders, citizens, and industrialists. Pittsburghers began to realize that unless something was done about the smoke, the city's future was extremely grim. A number of community leaders and city government officials, such as Mayor David L. Lawrence, began taking greater interest in the redevelopment. Finally in 1943, the

development group approached Richard King Mellon.¹ Mellon, then in Washington as head of Army Emergency Relief, took great interest in the proposed movement to clean up Pittsburgh. Leading industrialists and entrepreneurs of the city, public officials, congressmen, and other influential people gathered together in 1943 and seriously began discussing the city's problems. This thrust was greatly supported by a number of nonprofit associations created explicitly to develop and carry out the development program.

The Allegheny Conference on Community Development was born in 1942 and 1943. The Conference is a broad, nonpartisan organization consisting of 125 citizens, who are its sponsors. Most of the members are heads of corporations, and it is chaired by H. J. Heinz. In 1943, its first job was to conquer air pollution and flooding, the major obstacles to Pittsburgh's development. Since that time, the Allegheny Conference has been responsible for programs in housing, recreational facilities, and in combatting general urban blight. With the power of Richard Mellon, Benjamin Fairless, and others, together with the editors of Pittsburgh's two major newspapers, the Conference was able to exert enough leverage to pass strict and effective smoke control legislation in the late 1940's.

Another group responsible for Pittsburgh's development is the Pittsburgh Regional Planning Association, which is celebrating its 50th anniversary in 1968. This nonprofit group conducts studies and makes recommendations for the region's development. PRPA was responsible for the creation of the Allegheny Conference for Community Development in 1943. In 1962 PRPA started the Southwestern Pennsylvania Regional Planning Commission to perform similar studies on a broader, more comprehensive basis, including making recommendations for an area of six counties around Pittsburgh and to address itself to problems in transportation, water, sewers, etc. This group is supported by Federal funds.

-
1. Richard Mellon and David L. Lawrence are the two leaders in Pittsburgh's renaissance most often mentioned. The former, Republican, entrepreneur, governor, and president of T. Mellon and Sons, head of the Mellon interests that control Gulf Oil, Koppers Corporation, and Alcoa as well as having a dominant influence in U.S. Steel, Westinghouse, Pennsylvania Railroad, Pittsburgh Plate Glass, and Pittsburgh Consolidated Coal. The latter, Mr. Lawrence, was a Democrat and a politician who became mayor of the city from 1946 to 1959 and later became governor of the state. The Mellon prestige, money, and professional competence merging with Lawrence's political astuteness and support of the rank and file Democrats and organized Labor accomplished what neither man could have done alone. Lawrence banked his political future on smoke control. Mellon used his influence on business leaders to enlist their help in improving and rebuilding their city. Together the two men achieved smog reduction, replaced slums with modern buildings, controlled floods, and built vital roads, bridges, and tunnels. Together, with the imaginative and devoted efforts of a number of other community leaders these men stood behind the creation and development of the organizations discussed above.

The Pittsburgh story exemplifies the fact that development can be achieved through well directed programs. Pittsburgh's development was a multipronged effort, none of which could have occurred unless well intentioned men decided to act.

b. Cleveland, Ohio

Much can be learned from failures as well as from successes. That is the purpose for including this section on the recent "Cleveland Now" program. While "Cleveland Now" was not formed to stimulate commercial activity as a first priority, it has many of the elements necessary for a successful program of this type. "Cleveland Now," however, was plagued by many strategic errors and offers valuable lessons for Hamilton. The basic mistake was that there was little really new in "Cleveland Now," and the program attempted to create the impression of strong and vital activity with an elaborate public relations campaign.

The City of Cleveland launched "Cleveland Now" in the spring of 1968. The organization and strategy of "Cleveland Now" depended upon the particular political circumstances in Cleveland. Mayor Carl Stokes, the first negro mayor in a city with a negro population of about forty percent, was preceded by a stodgy administration headed by Mayor Locher. Mayor Locher had little cooperation from the business community. He was mayor during the 1966 riots. In 1965 Mayor Locher's election was first contested by Carl Stokes. Mr. Stokes lost the election to Mr. Locher in a three-way race. Mr. Stokes ran again in 1967 and successfully defeated the Mayor in the Democratic primary and then defeated Seth Taft, the Republican candidate in the November election.

Mayor Stokes had the support of the business community in this election, and received its support when he moved into city hall. Stokes' election attracted widespread interest. The Mayor is a symbol in Cleveland and has become a model for new vigor in this traditionally moribund and lackluster city.

A group working with the Mayor developed the "Cleveland Now" program immediately following the assassination of Dr. Martin Luther King. The "Cleveland Now" program was not instrumental in avoiding disorder following Dr. King's death, but it was successful in developing a spirit of activity and participation.²

2. In an interview one of the creators gave the following as examples of criteria for a successful program of this type: (a) The program serves as an umbrella for activities already being organized or to be organized subsequently. The program is not a unified one, but a form within which to encompass a multiplicity of activity. (b) The program must have specific projects and price-tags and a time table for implementation. (c) The program must include something for everyone so that all elements of the community can identify with the program. (d) An articulate spokesman must symbolize activities of the program. Here it was the mayor's responsibility.

In the mere ten days in which the "Cleveland Now" program was developed meetings were held with all the major groups in the city, and the program was publicly launched. The communications media were contacted early to seek their cooperation and to gain pledges of support. With these pledges, the Mayor and others went to the business community for their help. They told them of the media's commitment to the program, using this as a lever to get help from the business community in raising funds for an overall program, and for providing jobs for Cleveland residents through the National Alliance of Businessmen Program.³

Fund raising goals were divided into a possible public commitment and into one to absorb the contribution of the business community. The latter was administered by a new organization entitled The Growth Association of Greater Cleveland, an offshoot of the Cleveland Chamber of Commerce. The Growth Association committed itself to raise \$10 million from business. Group 66, an alliance of younger businessmen, committed itself to raise \$1.25 million from the public. Three months after the beginning of "Cleveland Now" \$500,000 was raised from the public and \$4.5 million from the business community. The leaders stated that there would be no difficulty in raising the rest of the money and that the groups have already solicited enough money for this year's program.

The overall program goals aimed at soliciting a total of \$117 million in the next two years, mostly from Federal funds. The share raised from the community would provide local contributions necessary to receive Federal Grants. Announcements stated that this was not a short term program but a \$1.5 *billion* program to be implemented over the next 10 years. The goals of "Cleveland Now" suggested that in the next two years the program would solicit 11,000 jobs for the "hard core" unemployed, that 4,600 housing units would be built, that the six urban renewal projects on the books would be started, and that other projects would be constructed.

The program with its financial and program goals, was announced by the Mayor on prime time television. This was the first public announcement of the program, and it was followed the next morning with a front page spread in the Cleveland Plain-Dealer. All the newspapers cooperated and had large spreads during the week. They developed "Cleveland Now" symbols, which were printed in the papers for weeks following the opening of the campaign. During the first few weeks all efforts were directed at fund raising and promotion. Bumper stickers were provided, buttons and posters were distributed widely throughout the city. All promotional materials used a bright orange color. Posters were placed in store windows, on the rapid transit, on the sides of buses, and on taxicabs. Art

3. The National Alliance of Businessmen is a program sponsored by the U.S. Department of Labor.

services and layout were provided at cost by local advertising agencies and all vendors contributed their services at cost. It has been estimated that the program cost approximately \$100,000.

The Mayor's office handled most of the essential coordination and staff work for the project – preparing speeches for the Mayor and other officials, setting up meetings, and preparing agendas. Organizational strategy of the “Cleveland Now” program was to bring various groups together for fund raising and other activities.

Once the program was in operation the “Cleveland Now” staff was inundated by people who wanted to participate. The staff, however, found it extremely difficult to find duties for volunteers and much of its work was directed toward developing activities for them.

Many programs that were to be announced anyway were placed under the “Cleveland Now” umbrella: a meat packing plant in Hough, a playground in Glenville, cleaning part of Lake Erie for swimming, housing in the Lee-Harvard area, and organizing a summer festival to seek employment for 4000 teenagers. Job development was to be accomplished under the School Neighborhood Youth Corps Program and through contribution of new jobs from industry.⁴ The program succeeded in creating interest among middle-class people, both white and black. The long term impact, however, remains uncertain. Since the program basically depended upon existing organizations, many of the conflicts between these and the Mayor's office still remained. For example, since the Growth Association collected funds from the business community, corporations have expressed interest in having a voice in the dispensation of funds. Conflict was expected between the public and private sectors, then. Also, it was expected that traditional groups such as the United Appeal would find it extremely difficult to meet their annual goal because of this fund raising effort.

No new organizations were established to carry out new programs. No commitments other than fund raising and small scale job development have been solicited from the business community. The dependence of the program on Federal funds resulted in a total dependence on Federal bureaucratic procedures and a need to utilize the funds collected toward meeting the local share. Local initiative, therefore, and local program funding would have been difficult. Showcase projects could have been designed as an alternative for local funding and immediate implementation, but this will now not be done. The realization that

4. The Neighborhood Youth Corps Program is another in the series conceived and operated by the U.S. Department of Labor.

most of the program is not new will eventually effect the voter. The effect of a short-range, high-impact program soon wears off.

The risks associated with a high-impact program are worth taking when promotion is accompanied by well planned and organized activity. Volunteers must be organized before recruitment and before funds are raised. This requires a large scale planning prior to the initiation of the program. This, unfortunately, was not done in the "Cleveland Now" program because of the haste with which the program was conceived and brought into operation.

Public relations and promotion, extremely effective in this program, help create the maximum impact for genuine programs. Without good promotion and publicity, progress may not be influential. This much is granted. Good public relations, however, are only effective when used to publicize a well-conceived basic program. "Cleveland Now" does not seem to have been well planned and well conceived.

3. Bridgeport, Connecticut

A former president of the Bridgeport Chamber of Commerce, still active in public life, told us that Bridgeport has for a long time deserved little respect because of its lack of effort in developing a program to engender a spirit of optimism and progress. He feels very strongly, however, that the city is doing something about this and that part of the remedial program lies in changing the attitude of city leaders.

Bridgeport, a city of about 150,000 people, is overshadowed by New Haven, Hartford, and New York City. It is heavily industrialized and has a great many wealthy people who work in the area and live in surrounding communities such as Fairfield, Westport, and Trumbull. In that sense it is much like Hamilton.

The universities and colleges in Bridgeport have made the biggest difference in changing the image of the city. Currently, there are four schools of higher education. The University of Bridgeport now has an enrollment of 9000 students. The university sponsors cultural activities such as a Shakespearean Series, a lecture series, book reviews, and training programs (for example, for the city police). There is excellent communication and cooperation between the city and the university. For instance, many industrialists sit on the university's Board, and a number of the university officials sit on boards of banks and large corporations in Bridgeport.

The second factor behind Bridgeport's changing attitude is the nature of change in its industrial structure. Bridgeport is moving away from the production of heavy, basic, goods to light industry characterized by electronics firms.

The third reason for Bridgeport's change is the fact that many companies are moving out of New York into Bridgeport. Bridgeport has been able to capitalize on its proximity to New York, and in the fact that it is a smaller, more convenient metropolitan area.

The number of industrialists and other influential people in the Bridgeport area have been concerned with the city and have devoted themselves to redevelopment programs. For example, a *Mayor's Action Committee*, which discusses any and all problems of Bridgeport and includes lawyers, bankers, manufacturers, and labor representatives. It has been in operation for two years and is highly successful, meeting on the call of the chairman. "Leadership is the most important ingredient in a successful redevelopment program," one such individual told us "Opportunities are insufficient unless there is qualified leadership to capitalize upon them."

We also interviewed a number of officers of a local corporation. They spoke of, "A brand new Bridgeport," which is the title of a program for physical change. A number of reasons were cited for a recent change in Bridgeport's retailing situation. For example, the city has built a large new parking facility. This, together with the completion of a new four-lane highway, resulted in establishment of two new department stores in downtown — Sears Roebuck and Gimbels. Several years ago, these companies and other major retailing chains were not even considering investigating Bridgeport as a potential site.

There are still things to be done, however. Entertainment is still highly deficient in Bridgeport and nothing has as yet been done to improve it.⁵ The need to get the involvement of the most prominent people in the city, both public and private, was expressed. With the help of 12 or 15 people the corporation officers maintained, almost anything can be done in any city. Also, they cited as a necessary ingredient for success, the support of press and other communications media.

5. Bridgeport does have an annual week-long P.T. Barnum Festival, however, which features a circus theme and draws about 100,000 people. And the Museum of Science and Industry, with its planetarium and exhibits, is frequented by school systems in neighboring towns.

Our final interview was with the president of a local university. He spoke primarily of the necessity to attain the cooperation of well-established people in the community, referring to a study of the power structure of Bridgeport conducted by Father McGinnis of Fairfield University. The study probed deeply into the question of who held power in Bridgeport and the nature of the power they possessed. *The study showed that the strongest individual in the city is the Mayor*, although Bridgeport (as Hamilton) has a weak mayor system. The most popular group in the city, he found, was the Chamber of Commerce. The Chamber has an elaborate committee structure to study various problems in the Bridgeport area and recommend solutions.

He described the programs the university has sponsored to help the city. It set up a monthly forum which it holds on campus for people from all over Fairfield County (which includes Bridgeport). While it can be seen that Bridgeport has not formed the same type of program as Pittsburgh's, its program structure contains all the essential elements for success. The cooperation between the public and private sectors is there. The mayor is committed to a development program, and so are prominent citizens in finance and industry. A new organization has been formed, the *Mayor's Action Committee*, and in Bridgeport the Chamber of Commerce also plays an active role. Bridgeport has benefited from general economic growth (as has Hamilton), its program does not have the crisis nature characterized in the Pittsburgh program. In this, it is more like Hamilton than either Pittsburgh or Cleveland and therefore serves as a good model. Hamilton officials, we understand, have already visited Bridgeport and we therefore encourage continued study of this community.

In our opinion, the one element that is lacking is a strong program commitment by the *Mayor's Action Committee*. In its present form the committee is primarily a discussion group. We believe that Bridgeport's development could be furthered even more if it would form a development program that begins with a crystallization of goals and the formation of activities to achieve those goals.

D. IMPLICATIONS FOR HAMILTON

1. Introduction

A pattern may be formed from the successes and failures of the cities we have just described and from other cities where development programs have been formed.

First, it is difficult to overemphasize the role of the mayor. He is in the best position to establish priority for a public program. The status of his office also strongly induces private citizens to act in community service programs at his request.

Participation of the mayor to form a successful development program is necessary, but not sufficient for success. The second important element is the participation of highly influential private citizens. Men of stature and community respect must join in a common cause to promote the program. These men are needed to harness the energies of other citizens, to solicit financial contributions by private firms in the city and to exert influence upon private and public officials in jurisdictions and places other than the cities themselves. Last, and most important, the managerial skill and imagination of these men are needed to create and implement development programs.

Another essential element in a development program is the formation of a specific set of activities designed to solve the development problem. Each city is unique in its industrial structure, history, distribution of wealth, ethnic background, and other factors that contribute to the development path it has taken in the past. The specific problems standing in the way of development must be identified and some program must be formed to correct these problems. This means that the city's problems must be carefully analyzed and activities must be created to solve these problems and set the city on a new development path.

The last general element in a successful development program consists of the formation of organizations to undertake the development program. Existing organizations not specifically designed to cope with an overall development problem generally do not do this job very well. Assigning other organizations to such a task diverts them from their initial purpose, and one they are generally comfortable with, and sends them into an area foreign to their interest. A new organization, therefore, must be formed to design and implement the new development program.

It is difficult, unfortunately, to generalize upon the exact nature of the development organization. We will recommend a general organizational form for Hamilton, but wish to point out that many possibilities of organizational design do exist. Some are designed and staffed by members of the private sector, and some are sponsored by the public sector. Mayor citizen's committees, and other organizational forms may also serve to create the development program.

An obviously necessary, but often unappreciated element in the successful development program is a perception that something is wrong and a strong desire to do something about it. This means that there must be an analysis of a city's problems and the formation of a series of program activities based upon this analysis which seeks to correct causes which underline the problem. There must, of course, be vision of what the community can become when the program is accomplished.

The formation of an organization is also essential. A unit in government can be created to address itself explicitly to the development task, and mobilize the public resources required to accomplish this. The public development group must work closely with the mayor. Indeed, it must be the mayor's operating arm in the matter of city or community development. In the private sector a development organization, which includes highly prestigious members of the community who wish to devote themselves to community betterment activities, must be formed. This organization should have a full time staff to carry out its work. The majority of development work may be handled by a series of committees of private people.

The support of communications media such as the press and television are also necessary so that the community may be informed of the activities undertaken in the development program and the need for those activities. Last, and closely related to the point that has just been made, is the desirability of public relations. Goals and accomplishments of the development program must be communicated to the population at large to attain support.

Let us now turn to some specific recommendations to implement the Phase 3 program.

2. Development Function In City Government

City government has already recognized the importance of the development function by creating the Hamilton Economic Development Commission. It is our feeling, however, that the development concept has been too narrowly conceived and that city government should recognize the complex nature of the development process. City development has important physical, social, and cultural aspects as well as a duty to stimulate new industry. We recommend, therefore, that the development function be expanded and take on new functions in city government.

3. The Director of Development

The city might take an example from San Francisco, California. Following a recommendation by Arthur D. Little, Inc. that city created a position of Director of Development. The function of that office is to coordinate the multiple aspects of city development and to fit the city's development program in with state and federal programs. In recognition of the fact that this is a very difficult task, San Francisco rewards the office well, and as a consequence has been able to attract men of high calibre to fill the position. We recommend that Hamilton follow the example of San Francisco and create a position titled Director of Development. The Director of Development should form a multifaceted development program in cooperation with the private sector.

It will be evident to all acquainted with the City of Hamilton that there are many elements that must be considered in this twin set of recommendations. The role of the Visitors and Conventions Bureau, the Urban Renewal Department, and the City Planning Department must obviously be considered. The complex relations between the mayor's office, the Board of Control, and the City Council must also be taken into consideration. We feel that the development function should be placed in the office of the Mayor.

4. A Private Citizens Development Organization

Because a program of the scope necessary to engender a new spirit requires the full-fledged cooperation of the private sector, we recommend that interested citizens in Hamilton form an organization that takes as its mission the development of Hamilton.

In the past Hamilton's citizens have shown a remarkable willingness to serve the common welfare. As mentioned above, the city has been benefited by the contribution of private citizens serving on commissions and committees to stimulate urban renewal, economic development, city planning, and to raise funds for the important Theatre Auditorium. We feel that work of this type should continue, but that it should be supplemented by a separate citizen's organization. One very important aspect of the program in this organization should be the creation of a series of events to create a new set of citizen attitudes toward the city itself. This will at the same time form the basis of a new attitude toward Hamilton by outsiders.

5. Formation of a Cultural and Social Program

A program to change the image of Hamilton must be one that contains events of genuine substance. While we cannot specify the precise content of such a program, we believe that consideration should be given to the sponsorship of a major artistic event such as a music or art festival for Hamilton. It might develop a significant prize for an original modern composition and feature this work at an annual event. It might also include on the program works composed for electronic modes of music and some of the other more unusual musical forms.

6. A Goals Program

Another possibility might be conducting a goals program. Goals programs, which have been successfully conducted by the City of Los Angeles and the State of Utah, focus the attention of citizens on an area's strengths and weaknesses and uncover the ideas of citizens for program direction. A goals program might consist of a series of neighborhood meetings conducted in the evenings. An essay contest

might also be an element. The voluntary citizens group recommended above might wish to hold a series of hearings where people could describe their vision for the future and their perception of today's weaknesses. These sessions might be televised in order to receive broad attention. Once the goals formation part of the program has been completed committees might be formed to develop programs for the major problem areas that have been specified. Thus, a separate committee might be formed to focus upon youth programs, recreational programs, social and cultural programs, and others brought to light.

7. University Relations

McMaster University has great potential to enrich the social and cultural life of Hamilton. We recommend that the Economic Development Commission continue to discuss this matter with officials of McMaster to encourage a strong contribution by the University. This institution, of course, has many goals. All fine universities do. More and more, however, universities are beginning to find that community work enables them to reach many of their goals. Officials at McMaster might wish to study how this can be done in Hamilton.

The precise content of a program for Hamilton must be specified by Hamiltonians. For that reason we offer only examples of things that might be done. We do feel, however, to make one more suggestion, that any program formed should provide a role for young people. It goes without saying that Hamilton's future depends upon the future contributions of her youth. The Mayor may wish to form a Youth Advisory Committee to inform him about the problems of youth in the city. Private organizations described above should also pay special attention to the needs of youth.

8. Regional Orientation

To be most effective, a development program for Hamilton should be conducted on a regional basis. One reason is that many citizens who will be asked to participate do not live in the city of Hamilton itself. These citizens, however, have a strong interest in the city because they work there. Our interviews uncovered many such citizens who expressed a strong willingness to participate in programs that would help Hamilton.

It is an obvious fact that any program developed in Hamilton will be heavily attended by people outside the city. In fact, it is quite possible that cultural and social programs to be developed over the coming years in Hamilton will be most heavily attended by residents of Burlington, Dundas, Ancaster and other outlying communities. Certainly, many of the programs in the Theater Auditorium will be attended by such people. Since people outside the city itself will participate in its events it seems reasonable to give them an opportunity to devote their efforts to the formation of such a program.

Future economic development of the Hamilton area will be largely a regional rather than a city matter. This is already widely recognized by many people in Hamilton. Much of the sophisticated industrial development of the future will be sited outside the city. In the future the city will emphasize commercial and office based activities. This does not mean that sophisticated industry may not develop within the city. This can happen, but only if special effort to provide room for such development is undertaken. But this does not contradict the point just made. No matter what happens within the city considerable development will take place in the region, and outside the city. People who work in this new industry will reside, most likely, outside the city, but will be served by commercial activity and cultural programs within the city itself.

Regional government is presently under study for the Hamilton area. This, in combination with the reasons just discussed, provides strong argument for our suggestion that the city think "regional" when it thinks of development.



CAMBRIDGE • EDINBURGH • ATHENS • BRUSSELS • ZÜRICH
WASHINGTON • CHICAGO • TORONTO • SANTA MONICA
NEW YORK • MEXICO CITY • LONDON • SAN FRANCISCO